

Scanning in a Blank Consent

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Version 20.17

About

Depending on your Practice's policies, you may choose to scan a blank consent form into OP that you will use for more than one patient. Prior to scanning in a blank consent form, you will need to be sure to add the new record type. Click [here](#) for instructions on the process.

To scan in a blank consent document:

1. Navigate to the Manage Documents: **Clinical or Practice Management tab > Document Mgmt button**
2. Click the **New Document** button.
3. Place the blank consent form on the scanner.
4. Click the **Page Scanner** button in the acquisition panel. The Consent form image is displayed in the sketch Panel.
5. Drag the image from the sketch panel to the preview panel.
6. In the Patient Information section of the Document Panel, enter the name of the Consent record in the patient name field.
7. In the Review Details section, use the drop-down in the Item Type field to select **CONSENT FRM TMPL**.
8. Select the **Reviewed?** checkbox.
9. Select **Any staff member** in the Privacy level field. With this setting, all staff will be able to see this consent form. If the consent form is meant to be private, then the Privacy level should be set accordingly. See [Privacy Constraints \(Visibility Settings\)](#) for more information.
10. Click the **Save** button.

Your new, blank consent form is now available to be attached to patient records.

Version 14.10

Depending on your practice's policies, you may decide that you'd like to scan a blank consent form into OP 14 that you will use for more than one patient. Prior to scanning in a blank consent form, you will need to be sure to add the new record type. Click [here](#) for instruction on the process.

To scan in a blank consent document:

1. Click the **Docs** button on the Smart Toolbar.
2. Click the **New Document** button.
3. Place the blank 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. Make sure there is no patient number selected, and enter the name of the Consent Record in the patient name 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 **CONSENT FRM TMPL**.
8. Mark the **Reviewed** checkbox.
9. Mark the Privacy level to **Any staff member**. With this setting, all staff will be able to see this consent form. If the consent forms is meant to be private, then the Privacy level should be set accordingly. See [Privacy Constraints \(Visibility Settings\)](#) for more information.
10. Click the **Save** button.

Your new, blank consent form is now available to be attached to patient records.

