

Important Content Update Message



We are currently updating the OP Help Center content for the release of OP 20. We appreciate your patience as we continue to update all of our content. To locate the version of your software, navigate to: **Help tab > About**

Manage Document Types and Categories

Last Modified on 05/06/2020 11:06 am EDT

Version 14.19

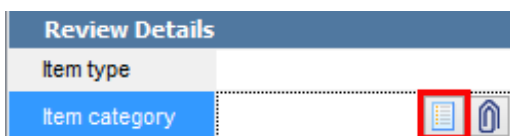
You may find it necessary to add, edit, or delete document types and/or categories from the OP software. This article will instruct you how to manage your document types and categories to ensure they are meaningful to your practice.





Warning: Document Types may be added, but it is strongly advised not to delete Document Types as deletion may effect some functionality in OP. If duplicates are created (and must be deleted) caution must be taken to delete only the one created in error.

Add a Document Type or Category

1. Click **Document Mgmt** in the Clinical or Practice Management tab.
2. Click the **New Document** button.
3. Click in the **Item Category** field and select the page icon. The Document Types and Categories window is displayed with the Document Type pane on the left and the Document Category pane on the right.




4. Click the **Add** button  below the respective Document Type or Document Category pane to create a new entry. A blank field is displayed for your new entry.
5. Enter the new Document Type or Category.
6. Click the **Save** button  to save your changes.

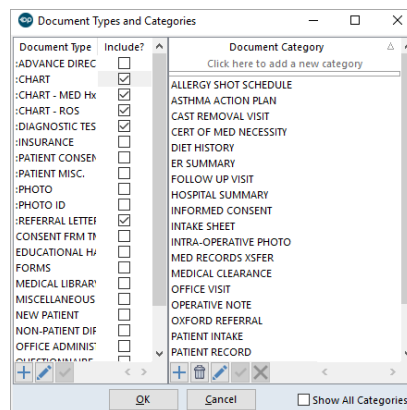


Note: You may view all Document Categories by selecting the **Show All Categories** checkbox located at the bottom of the Document Category panel.

Edit a Document Type

A Document Type cannot be changed, but a practice may edit the document type to include or exclude document images from Event Chronology reports. To do this:

1. Click **Document Mgmt** in the Clinical or Practice Management tab.
2. If you have navigated away from the Document Types and Categories window, click the **New Document** button.
3. Click in the **Item Category** field and select the page icon. The Document Types and Categories window is displayed with the Document Type pane on the left and the Document Category pane on the right.
4. Select the Document Type to edit and click the **Edit** button .
5. Select the checkbox in the **Include?** column.



6. Click the **Save** button to save your changes.
7. Click **OK** to exit the window.

Edit a Document Category


1. Click **Document Mgmt** in the Clinical or Practice Management tab.
2. If you have navigated away from the Document Types and Categories window, click the **New Document** button.
3. Click in the **Item Category** field and select the page icon. The Document Types and Categories window is displayed with the Document Type pane on the left and the Document Category pane on the right.
4. Select the Document Type that contains the Category that needs to be edited.
5. Select the Document Category to edit and click the **Edit** button.



Warning: It is important to ensure that the Document Category is selected prior to the next step, clicking the **Edit** button. If a Document Category is not selected, the edit will be made to the Document Type and could potentially cause functionality issues in your system.

6. Make the necessary edits.
7. Click the **Save** button to save your changes.
8. Click the **OK** button to exit the window.

Delete a Document Category

1. Click **Document Mgmt** in the Clinical or Practice Management tab.
2. If you have navigated away from the Document Types and Categories window, click the **New Document** button.
3. Click in the **Item Category** field and select the page icon. The Document Types and Categories window is displayed with the Document Type pane on the left and the Document Category pane on the right.
4. Select the Document Type that contains the Category that needs to be deleted.
5. Select the Document Category to delete and click the **Delete** button .



Warning: It is important to ensure that the Document Category is selected prior to clicking the **Delete** button. If a Document Category is not selected, the edit will be made to the Document Type and could potentially cause functionality issues in your system.

6. Confirm the deletion by clicking **OK** in the pop-up confirm box.
7. Click **OK** to exit the window.

Version 14.10

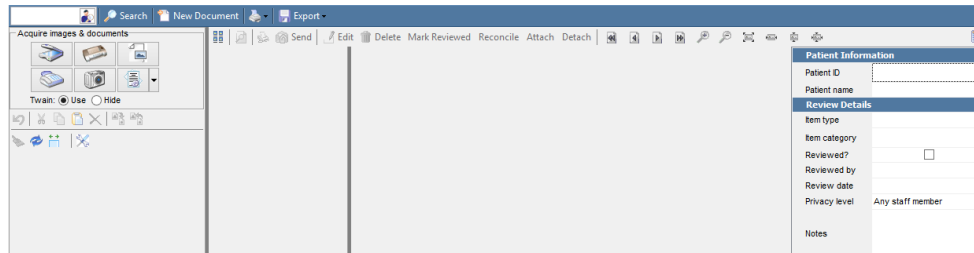
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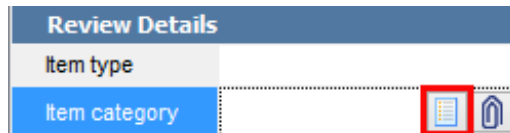
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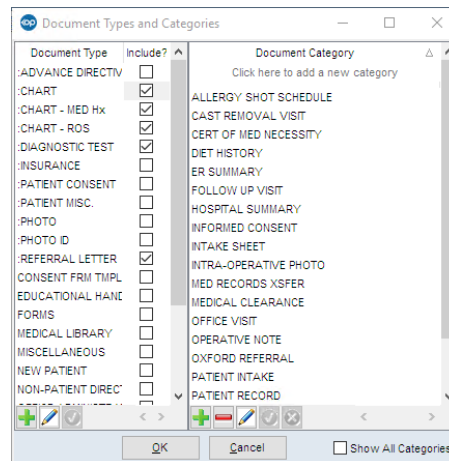
1. Click **Docs** on the Smart Toolbar.
2. Click the **New Document** button. The window will appear to match the following image.





- Click in the **Item Category** field and select the page icon.



The Document Types and Categories window will open. The Document Type pane appears on the left and the Document Category pane appears on the right.



- Click the **Add Record** button  below the respective Document Type or Document Category pane to create a new entry. A blank field will appear for your new entry.
- Enter the new Document Type or Category.
- Click the **Post Edit** button  to save your changes.



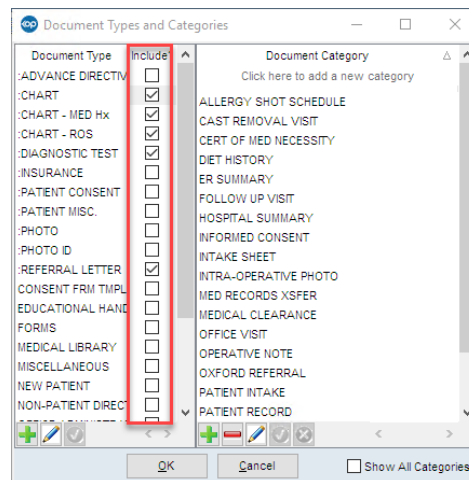
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Edit a Document Type

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- If you have navigated away from the Document Types and Categories window, click **New Document**.
- Click in the **Item Category** field and select the page icon. The Document Types and Categories window will open where the Document Type appears on the left and the Document Category appears on the right.
- Select the Document Type to edit and click the **Edit Record** button.
- Select the checkbox in the **Include?** column.



- Click the **Post Edit** button to save your changes.
- Click **OK** to exit the window.

Edit a Document Category

- Click **Docs** on the Smart Toolbar.
- If you have navigated away from the Document Types and Categories window, click **New Document**.
- Click in the **Item Category** field and select the page icon. The Document Types and Categories window will open where the Document Type appears on the left and the Document Category appears on the right.
- Select the Document Type that contains the Category that needs to be edited.
- Select the Document Category to edit and click the **Edit Record** button . The cursor will appear in the field for edits to be made.





Warning: It is important to ensure that the Document Category is selected prior to the next step, clicking the **Edit Record** button. If a Document Category is not selected, the edit will be made to the Document Type and could potentially cause functionality issues in your system.


- Make necessary edits.
- Click the **Post Edit** button to save your changes.
- Click **OK** to exit the window.

Delete a Document Category

1. Click **Docs** on the Smart Toolbar.
2. If you have navigated away from the Document Types and Categories window, click **New Document**.
3. Click in the Item Category field and select the page icon.

Review Details	
Item type	
Item category	 

The Document Types and Categories window will open where the Document Type appears on the left and the Document Category appears on the right.

4. Select the Document Type that contains the Category that needs to be deleted.
5. Select the Document Category to delete and click the **Delete Record** button .



Warning: It is important to ensure that the Document Category is selected prior to clicking the **Delete Record** button. If a Document Category is not selected, the edit will be made to the Document Type and could potentially cause functionality issues in your system.

6. Confirm the deletion by clicking **OK** in the pop-up confirm box.
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Version 14.8

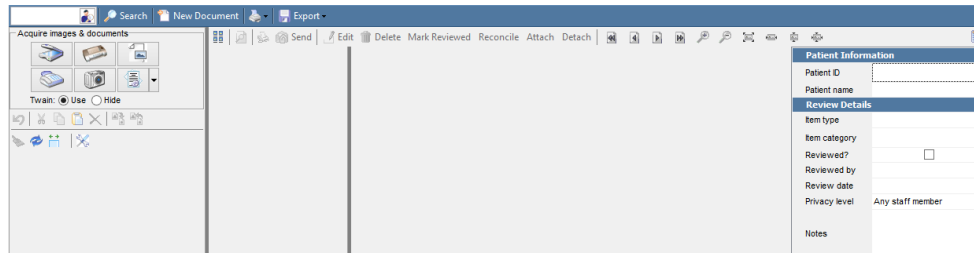
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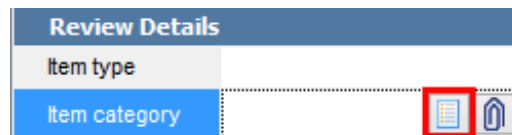
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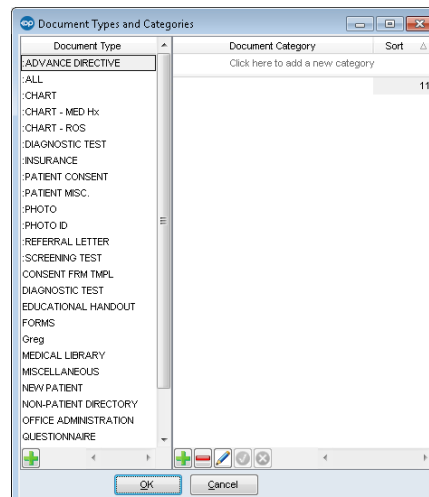
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5. Select the Document Category to edit and click the **Edit Record** button . The cursor will appear in the field for edits to be made.





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Review Details	
Item type	
Item category	 

The Document Types and Categories window will open where the Document Type appears on the left and the Document Category appears on the right.

4. Select the Document Type that contains the Category that needs to be deleted.
5. Select the Document Category to delete and click the **Delete Record** button .



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6. Confirm the deletion by clicking **OK** in the pop-up confirm box.
7. Click **OK** to exit the window.