

CATEGORY: PATIENT REGISTRATION ~ SCANNING

Patient Documents

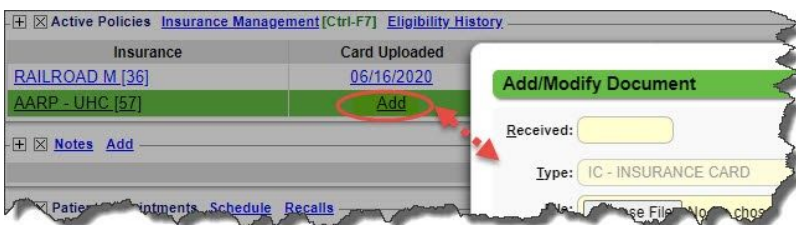
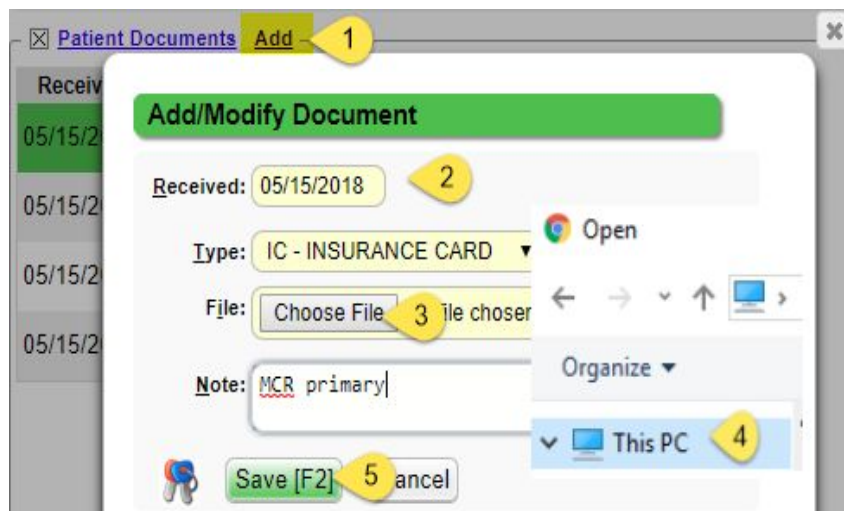
On the Patient Dashboard, we have a system delivered method that allows you to scan and store items such as, Insurance and Driver's License cards. It is recommended to use an EMR/EHR for any additional documentation. There is a 2MB file size limit, this cannot be increased. Please note we do not support TIF type files.

We recommend a specific folder for scanning to. You may like a naming convention, with a portion of the patient name i.e., for John Smith's drivers license 'Smith J DL'. We recommend the folder be cleared or purged daily. It can be useful to have access to the scans for a short period of time in case the user has uploaded the wrong file or other technical issues. Some clients ask their IT dept to schedule this action.

How do I scan documents and upload documents?

From the patient dashboard, in the 'Patient Documents' section

1. Click ADD
2. Date auto populates with today's date
→ Choose 'Type' of item being scanned - IC-insurance card, DL- driver's licence
3. Scan the item to your desktop > Click [Choose File]
→ Choose the file from your desktop
→ Note: displays in document section, for insurance identify primary, 1, secondary, 2, etc
4. [Save]



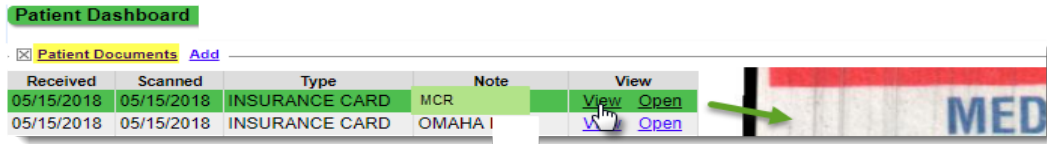
< Access to add directly the the policy

If the system detects that there is already a policy with the same insurance, then we display a 'duplicate insurance policy' warning dialog. Simply close that dialog, we will automatically create a new insurance policy with the information that was scanned. Otherwise if they select one of the policies from the warning, we will take them to the 'Document Review' page where they can update the already existing insurance policy.

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How do I view scanned documents?

Click 'View' next to the document you want to view -this will show within the page



Click 'OPEN' to pop out the document and the double square icon to



open this in a new tab



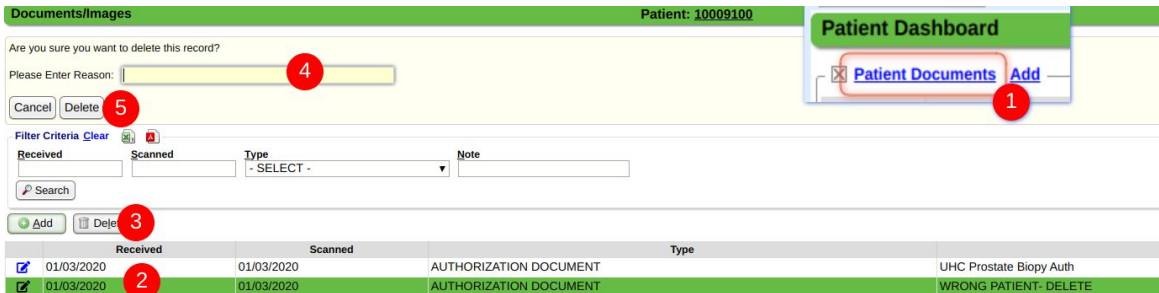
and the 'x' to close the popup



How to delete a scanned document

To Delete a document > From the patient dashboard >

1. Click 'Patient Document'
2. Highlight the document
3. Click [Delete]
4. Add a Reason for deleting
5. Click [Delete]



How do I download a scanned image?

Depending on how the image is scanned and uploaded, you have different access to print or save locally the image. Click 'View'. Right-click on the image and choose "Save Image As" or "Print".

