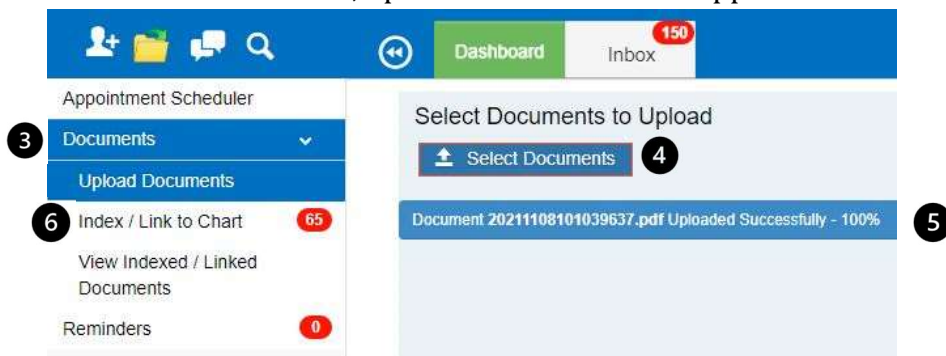


How to Upload and Index Scanned Documents into EHR

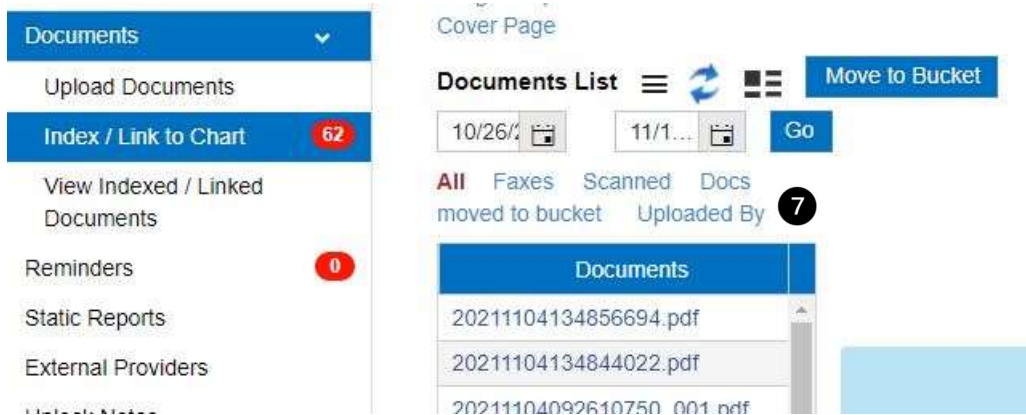
Uploading Documents:

1. Open chart of client
2. Click on Documents within top ribbon. Verify that the documents you are looking to upload aren't already Indexed. If the documents are not there, then continue to step 3
3. Select Dashboard (located next to the Inbox tab) Click on the Documents tab located on the left side of your screen by clicking ONE time on the word "Documents".
4. Click on the "Select Documents" tab and locate the scanned file you would like to upload to EHR.
5. Once the desired file is located , open that file and it will appear here.

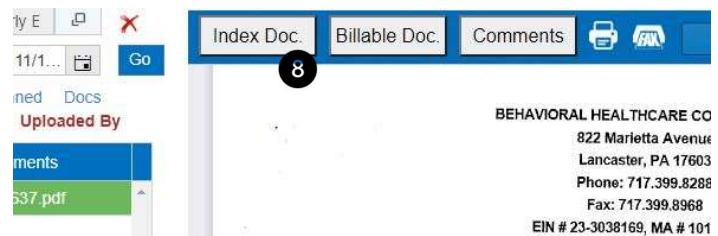


Indexing Documents:

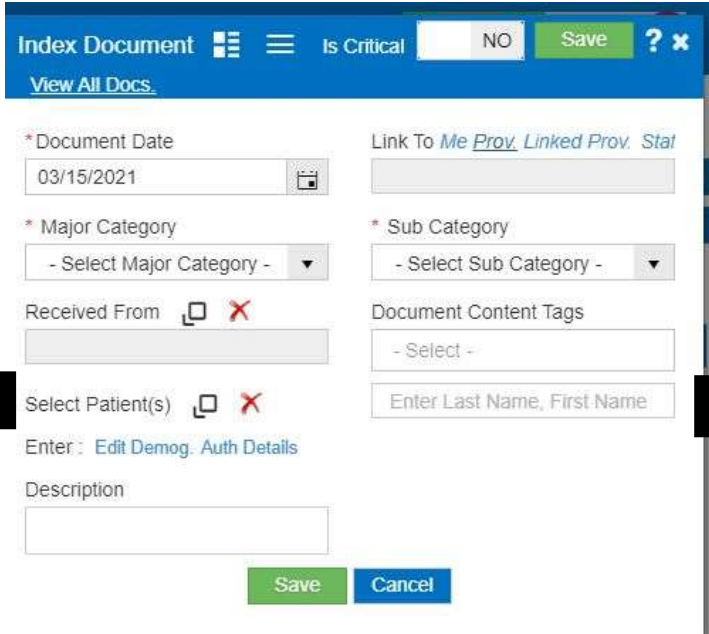
6. Now click on the "Index / Link to Chart" tab. This is on the left side directly under the "Upload Documents" tab.
7. Select "Uploaded By". This will allow you to view only those documents you uploaded to EHR rather than everyone else who has uploaded documents.



8. The document you uploaded to EHR should now be in your list of Documents. Click on the "Index Doc."



9. Once the “Index Document” tab has been clicked, the following will open. (9a) Select the Patient’s name by clicking on the . Select the client to which this document should be attached. (9b) You may also search by entering the client’s name here.
10. Complete all sections with a red asterisk. (Document Date, Major Category, and Sub Category)



11. All documents of the same type dated 3/31/21 or before should be grouped together and indexed with the “Document Date” of 03/31/21.
12. Select “Save”.

Major and Sub Categories:

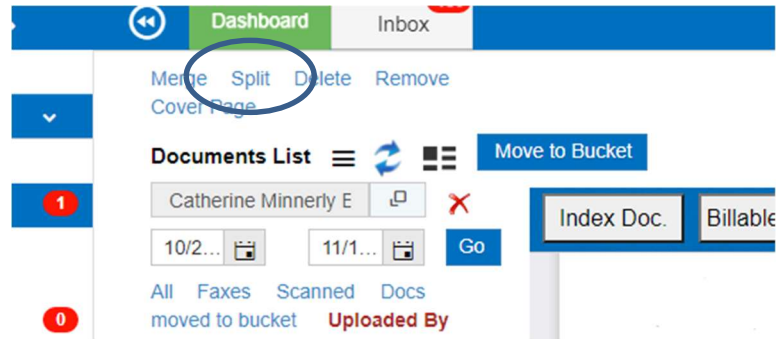
1. Financial
 - a. Authorizations/Authorization Requests
 - b. Insurance Card(s)
 - c. Insurance Eligibility Checks
 - d. Super Bill
2. Intake Forms
 - a. Biopsychosocial
 - b. Checklists
 - c. Facesheet
 - d. Initial Evaluation
 - e. MPN Assessment
 - f. MSR Intake Questionnaire
 - g. OPC Client Questionnaire
 - h. Practitioner Order Form
 - i. Psychiatric Evaluation
 - j. Referral Intake Information
3. Consents
 - a. Authorization Revocation
 - b. Individual Rights and Responsibilities/Fee Schedule

- c. OPC Insurance Waiver/Payment Agreement
- d. Releases/Consents
- 4. Screenings
 - a. Alcohol Use Disorders Test
 - b. DAST
 - c. Physician Client Update Questionnaire
 - d. PHQ9
 - e. Cognition Test
- 5. Treatment Plans
 - a. Crisis/Safety Plan
 - b. MPN Recovery/Treatment Plan
 - c. OPN Recovery/Treatment Plan
- 6. Progress Notes
 - a. Group Notes
 - b. MPN Progress Note
 - c. MSR Progress Note
 - d. On-Call Progress Note (On-Call Contact)
 - e. OPC Progress Note (Multidisciplinary Progress Log)
 - f. Physician Progress Note
 - g. Physician Therapy Note
- 7. Medications/Labs
 - a. Lab Results
 - b. Medication Flow Sheet/Physician's Order Sheet
 - c. Physician Orders
- 8. Discharge Forms
 - a. MPN Discharge Instructions
 - b. OPC Discharge Instructions
 - c. OPC Discharge Notice
 - d. OPC Discharge Summary
- 9. Other
 - a. Correspondence and Miscellaneous
 - i. COVID-19 screenings should be indexed here.
 - b. OPC Internal Transfer Referral
 - c. Medical Records

Splitting Documents:

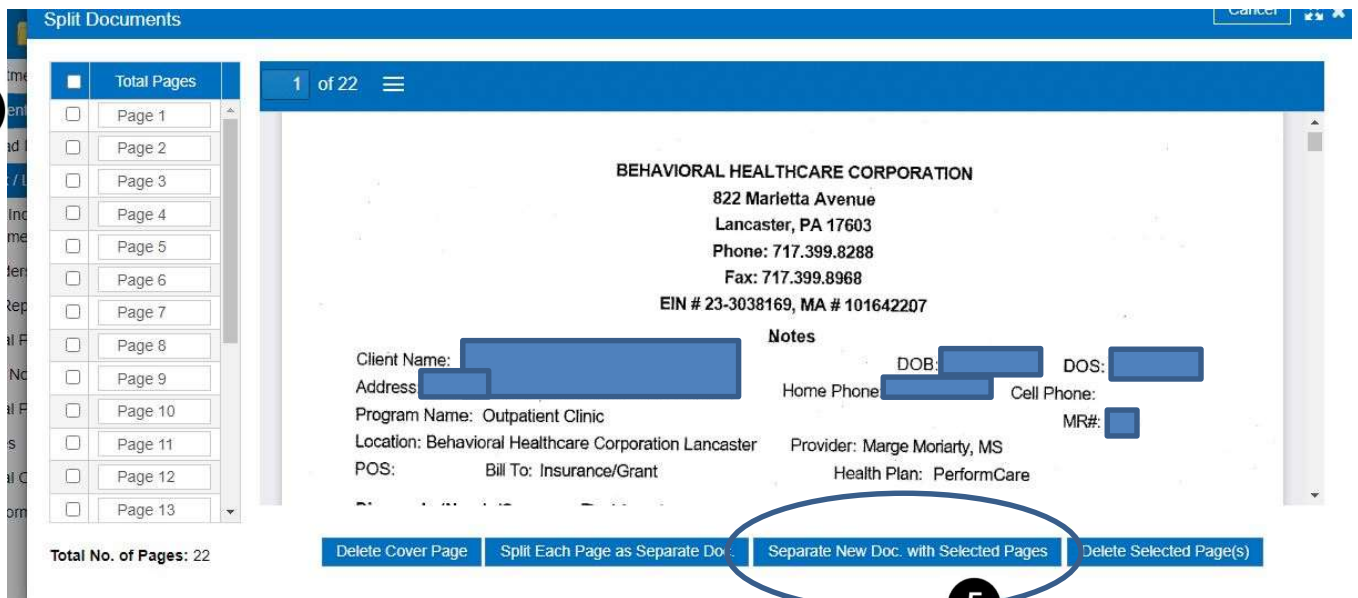
If a variety of documents have been uploaded together creating a single document. Splitting of the like documents before indexing will need to occur. *Remember that all documents of the same type dated 3/31/21 or before should be grouped together and indexed with the “Document Date” of 03/31/21.

1. Select the “Split” option.



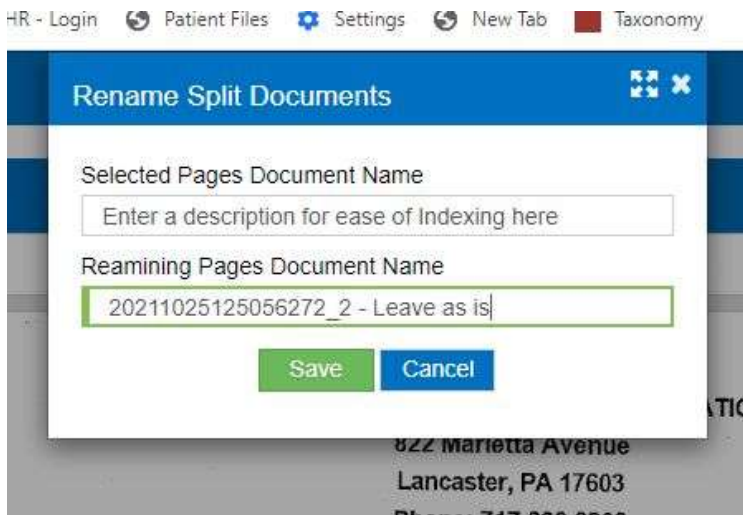
2. A pop-up window will appear. This will display all of the pages in this uploaded document.
3. Scroll through to view the documents. Keep note of which documents are on which days.
4. Select the group or single document you would like to split from the other documents using the left side of the pop-up window.
5. Once you have those document(s) selected click “Separate New Doc. With Selected Pages”.

4

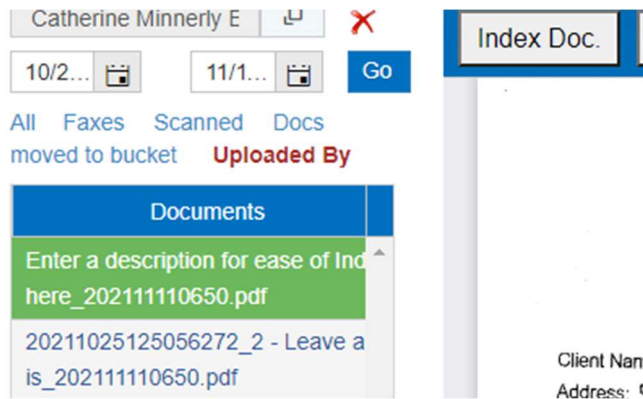


5

- The following pop-up window will appear. Change the name of “Selected Pages Document Name” to make it easier for indexing. The “Reaminging Pages Document Name” should be left as is.



- Select Save.
- The document(s) you Split will now be shown in your Documents list. A single click on the document will show you the document(s).



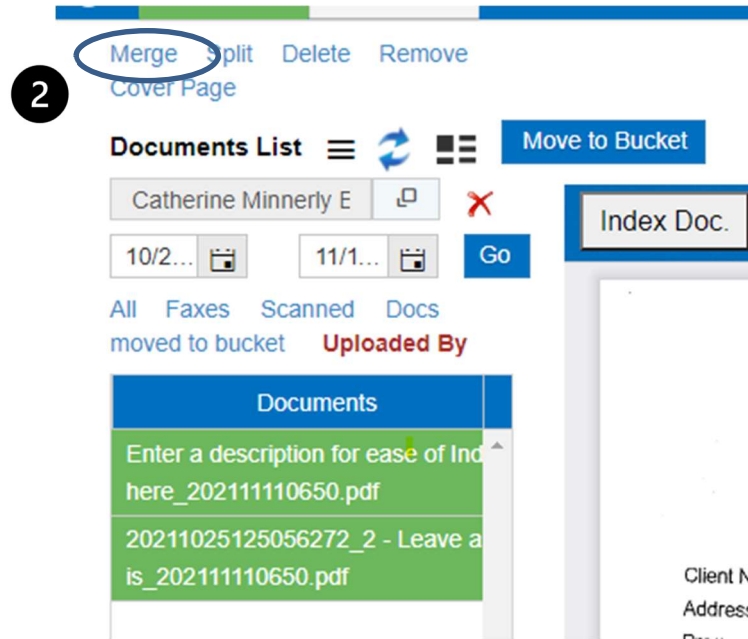
- Continue Indexing.

Merging:

If there are multiple documents in the Documents list it may be necessary to merge documents.

Merging documents can be done quickly.

1. Click on one of the documents you would like to merge. If the second page you would like to merge is further down the list then single click on the document while pressing the CTRL button on your keypad. If the document is directly below then single click on the document while pressing the Shift button on your keypad. You should see both documents highlighted green.



2. Select the “Merge” option.
3. The “Merge Documents” pop-up window will appear.
4. If the order of documents are out of order use the ▲ ▼ to arrange them in the correct order. Single click on the document you would like to move up or down.
5. Click on “Merge Documents”.
6. Continue Indexing.

