![MUNSON HEALTHCARE]

Scanned Documents & Signing

Attention: Ambulatory Phase 1 Office Staff

Ambulatory PowerChart Updates

Effective: 9/30/19

Before you begin, review the document for appropriateness:

- Does the document contain a valid signature?
- Reference the mapping document for specific items that should not be scanned, or scanning that may result in a duplicate document: Scanning – Document Mapping

Scanning/Import

1. Open the patient's chart to the encounter where the document should be saved. In most cases, the correct encounter is the Phone Message Non Billable. However, if the document is related to a recent office encounter, it should be scanned to that known encounter.
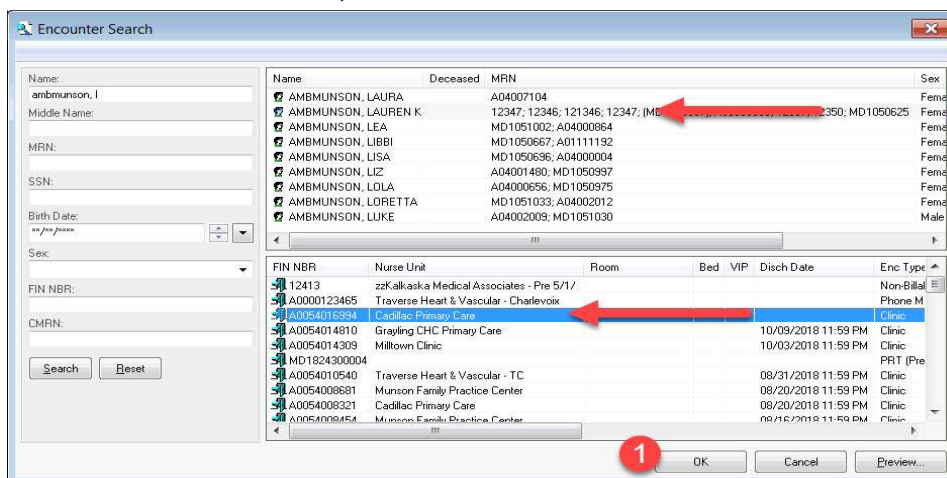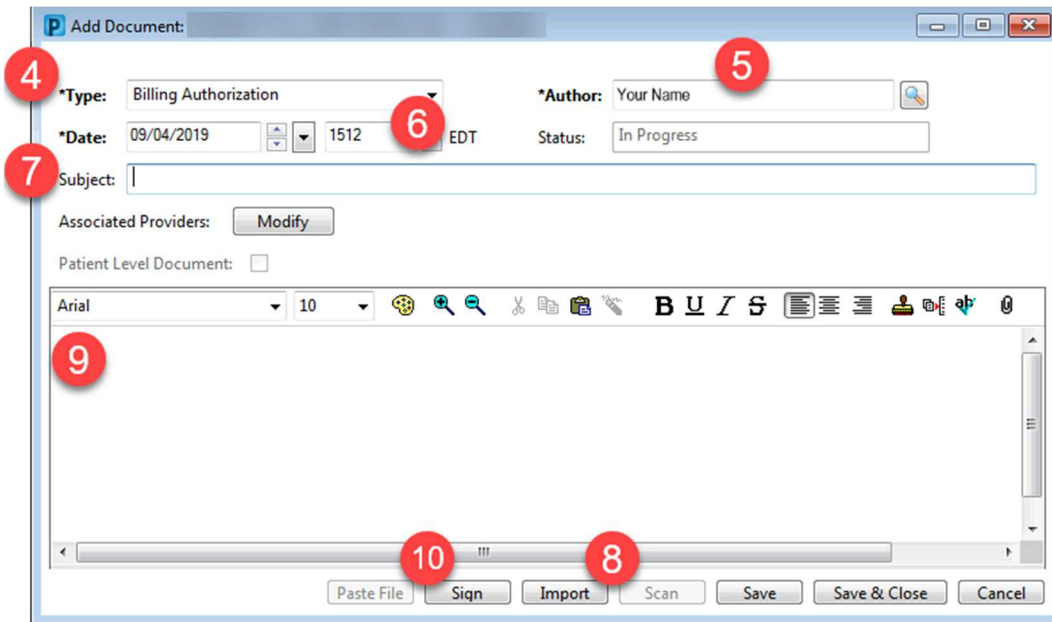

2. Navigate to the '**Menu**' and click on '**Clinical Notes**'.

Clinical EHR Education
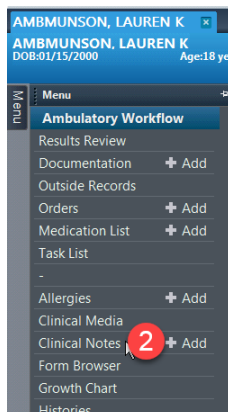
3. Click on the '**Scan/Import**' button
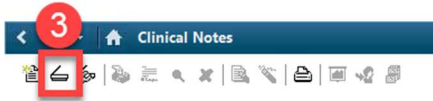
4. Choose the appropriate note '**Type**', as directed on the mapping document located here: Scanning – Document Mapping

5. Leave the '**Author**' field as the user's name.
6. Update the '**Date**' and '**Time**' (military) to the date and time noted on the document. See the mapping document for direction on how to date each type of document.
7. The '**Subject**' field is required:
   a. Add additional information in the subject as directed on the mapping document.
   b. Per standard naming convention, capitalize the first letter of each word (**not all caps**).
8. Select '**Scan**' button to scan in the document or select '**Import**' to import the document from a saved file.
9. Review the document for accuracy and quality.
10. Click the [Sign] button to authenticate the document.

MUNSON HEALTHCARE

Forwarding a Document for Provider Review

In most cases, the scanned/imported document needs to be sent to a provider for review. The following steps allow you to forward a document to a provider's Message Center.

1. Navigate to '**Clinical Notes**' from the '**Menu**' bar, and select the '**Forward**' button:
2. From the '**Additional Action**' pick-list, select '**To Review**'.
3. In the '**To:**' field, add in the recipient.
4. Add '**Comments**', if necessary
5. Click '**OK**'.

Questions? Call Ambulatory Informatics at (231) 392-0229.