

Scanned Documents & Signing

Attention: Ambulatory Phase 1 Office Staff

Ambulatory PowerChart Updates

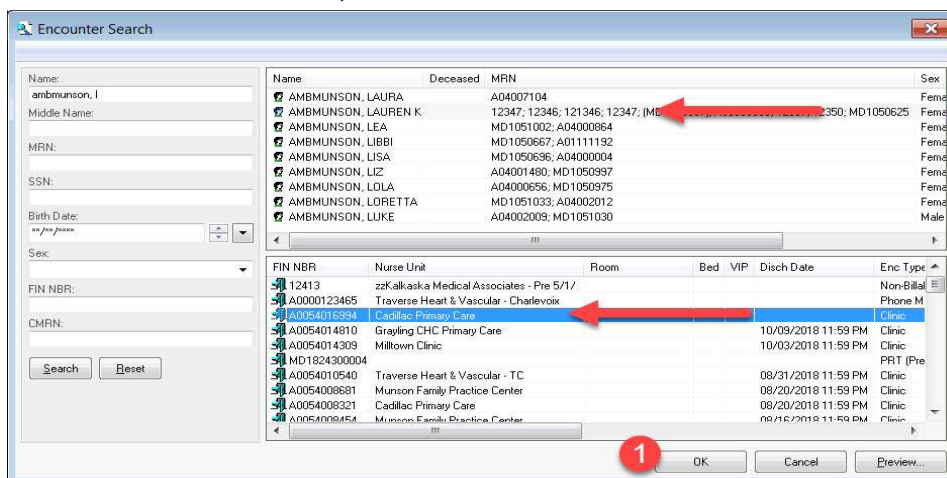
Effective: 9/30/19

Before you begin, review the document for appropriateness:

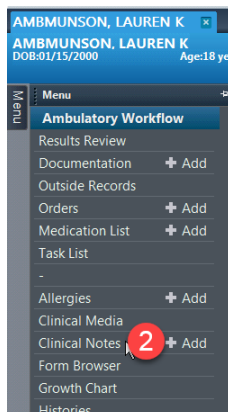
- Does the document contain a valid signature?
- Reference the mapping document for specific items that should not be scanned, or scanning that may result in a duplicate document: [Scanning – Document Mapping](#)

Scanning/Import

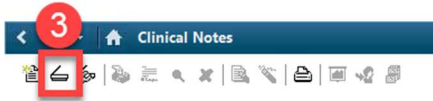
1. Open the patient's chart to the encounter where the document should be saved. In most cases, the correct encounter is the Phone Message Non Billable. However, if the document is related to a recent office encounter, it should be scanned to that known encounter.



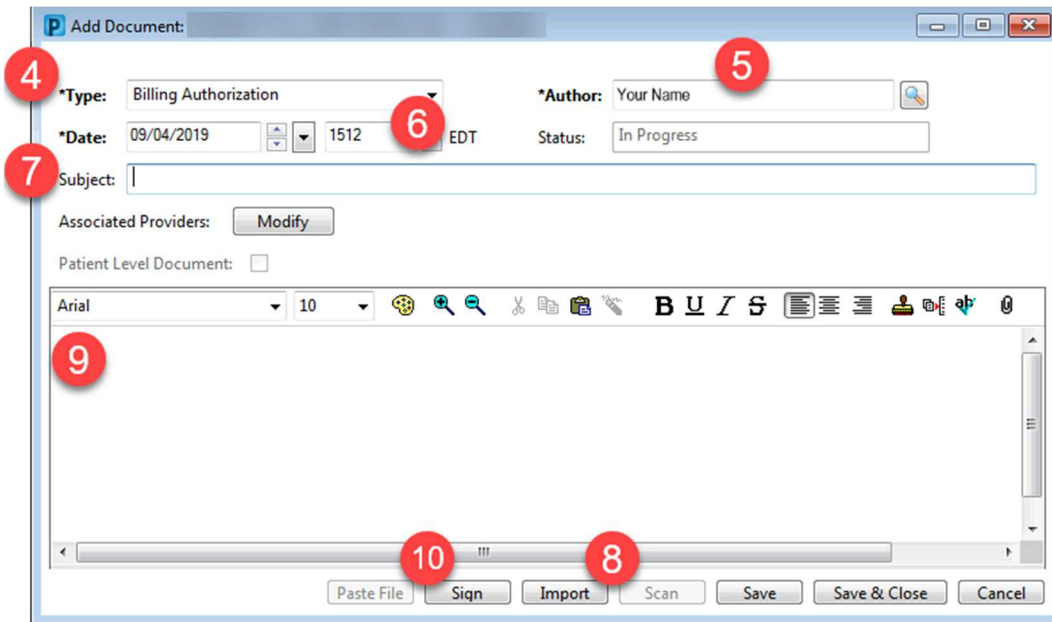
2. Navigate to the 'Menu' and click on 'Clinical Notes'.



- Click on the 'Scan/Import' button




- Choose the appropriate note 'Type', as directed on the mapping document located here: [Scanning – Document Mapping](#)



- Leave the 'Author' field as the user's name.
- 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.
- The 'Subject' field is required:
 - Add additional information in the subject as directed on the mapping document.
 - Per standard naming convention, capitalize the first letter of each word (**not all caps**).
- Select 'Scan' button to scan in the document or select 'Import' to import the document from a saved file.
- Review the document for accuracy and quality.
- Click the button to authenticate the document.

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'**.



Forward Only: Documents: AMBMUNSON, LAUREN K

Additional Action: **2** To: **3**

Comments: **4**

Cancel OK **5**



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Single-Document Scanning Update
Affects: This change affects all ambulatory staff who perform single document scanning.

Ambulatory scanning staff should revert to using their own name in the Author field, as was originally directed at go-live. The Author field defaults to the user's name. If you are changing the Author to Scanned, Documents, please discontinue this practice immediately.

Action required and timing

- Staff should leave their own name in the Author field, effective immediately.

Details
 In your Scan/Import Add Document window, the Author field defaults to your name.



Using your name as the Author has multiple benefits:

- It eliminates the extra step of changing the author.
- It allows you to Sign the document within the main Scan/Import Add Document window and eliminates the need to add additional steps to your workflow.

This change is part of efforts to optimize the single document scanning process to:

- Improve the quality of scanned documents
- Improve providers' ability to locate documents needed for patient care

Additional information

- Additional scanning updates will be provided in the coming weeks. Please contact Ambulatory Informatics at 231-392-0229 for additional information.

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