

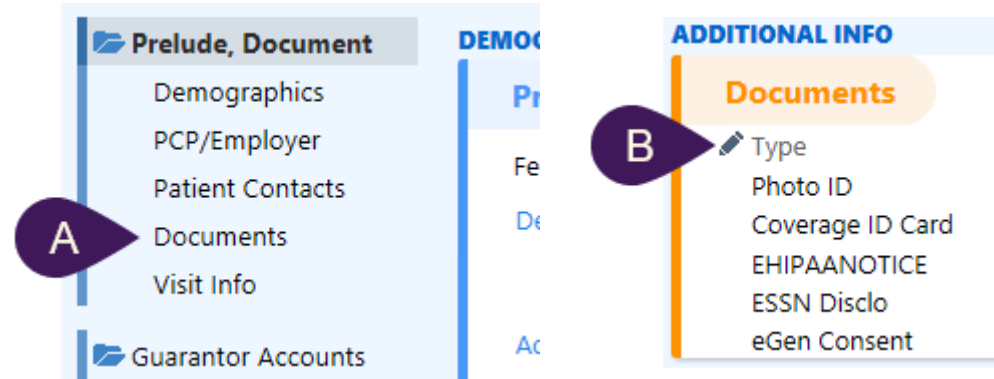
Using the Document Table

Note: This quick guide will show how to use the Document Table in Registration. Unless stated, the forms discussed below are accessed using hyperlinks on the Interactive Face Sheet.

Epic Quick Guide

With the Epic November 2019 upgrade, the Document Table has been redesigned to better support how you view and interact with patients' documents. **Note:** This quick guide only goes over the Document Table. The steps to scanning and e-signing documents has not changed.

You can access the Document Table by clicking the (A) **Documents** form on the *Registration Tree* or by clicking the (B) **Pencil** icon located on the *Interactive Face Sheet*.



The screenshot shows the 'Documents' window with a table of document records. The table has columns for Type, Status, Received By, Received On, and Expires On. There are also buttons for adding new document types and a 'Show All Documents' checkbox.

Type	Status	Received By	Received On	Expires On
eGeneral Consent Form	Received	TEST, FRONT DESK	03/02/2020	-
Photo ID	Received	TEST, FRONT DESK	03/02/2020	-
Coverage ID Card	Not Received	TEST, FRONT DESK	-	-
eHIPAANoticeOfPrivacyPractices.html	Not Received	TEST, FRONT DESK	-	-
eSSNDisclosureConsent.html	Not Received	TEST, FRONT DESK	-	-

Double-click to acquire/view a document



Buttons: Accept Cancel

Using the Document Table

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Let's first look at the top section of the Document Table.

Documents

New Document Type + Add + 1 Photo ID + 2 eSSNDisclosur... + 3 Coverage ID Card Show All Documents  

You can use the search box to find a desired document to scan or e-sign. As you enter letters to search, you'll see a list of matching documents. You can click on the document or continue entering more letters to narrow the list to one option then click tab or enter on your keyboard. This will select the document to scan or e-sign.

Documents

e| + Add + 1 Photo ID + 2 eSSNDisclos

Title	Number
eAssignmentofBenefitsNEW	100049
eGeneral Consent Form	100060
eHIPAANoticeOfPrivacyPractices.html	1000056
Email Authorization Agreement	100025
ePhotography Consent	100056
eSSNDisclosureConsent.html	100042

Documents

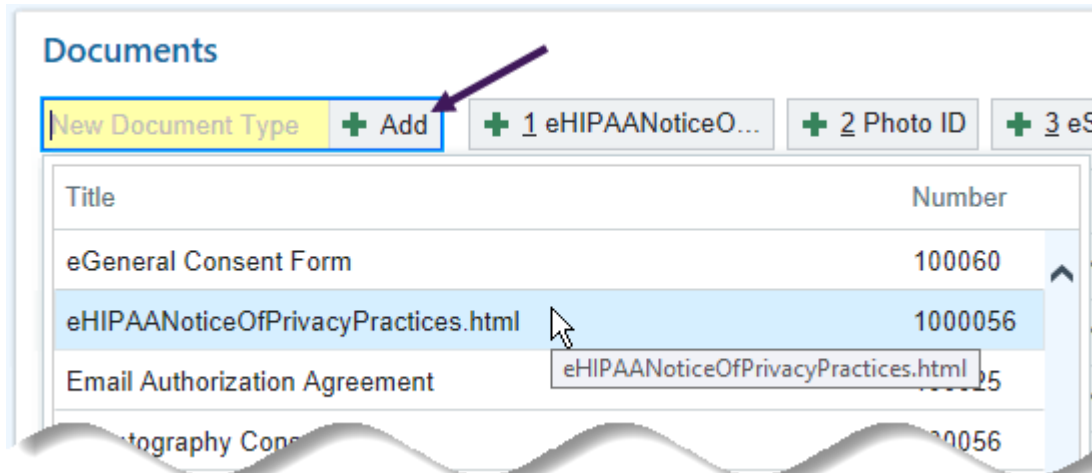
eh| + Add + 1 Photo ID + 2 eHIPAANotic

Title	Number
eHIPAANoticeOfPrivacyPractices.html	1000056

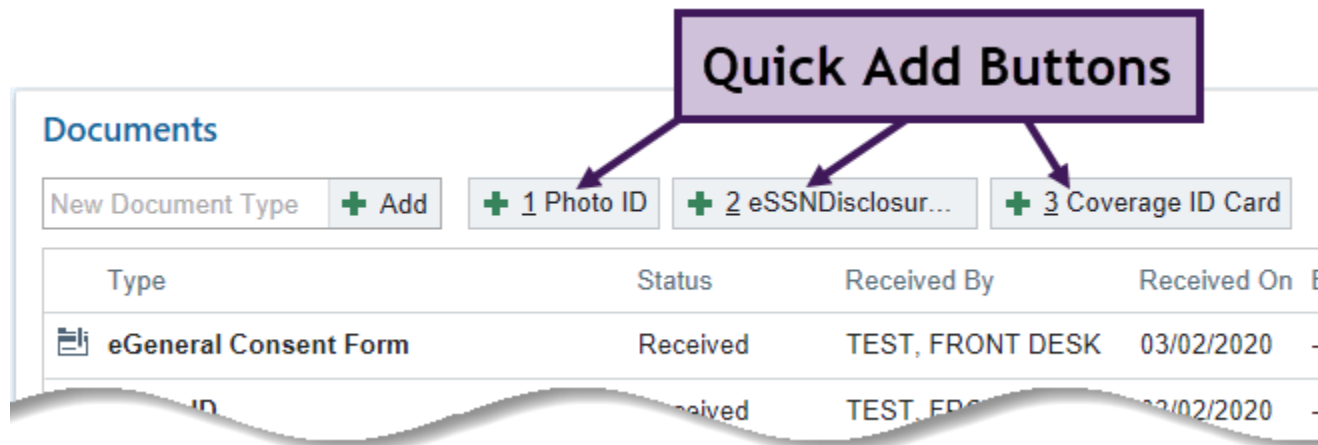
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You can also click on the **Add** button to view the full list of documents. Just select the desired document from the list to scan or e-sign.





The Document Table dynamically adds quick buttons based on the document types you add most frequently, saving clicks compared to searching for the documents using the search box. Just click on any of these buttons to scan or e-sign the document.



Using the Document Table

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Now let's look at the other section of the Document Table.

Type	Status	Received By	Received On	Expires On
 eGeneral Consent Form	Received	TEST, FRONT DESK	03/02/2020	-
 Photo ID	Received	TEST, FRONT DESK	03/02/2020	-
Coverage ID Card	Not Received	TEST, FRONT DESK	-	-
eHIPAANoticeOfPrivacyPractices.html	Not Received	TEST, FRONT DESK	-	-
eSSNDisclosureConsent.html	Not Received	TEST, FRONT DESK	-	-

Double-click to acquire/view a document

When a document has been scanned or e-signed you will see the following icons:



Scanned Document



E-Signature Document


You can click on these icons to open and view the document. You can also double click on a document with one of these icons to open and view the document.

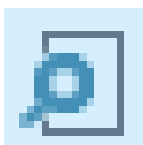
Double clicking on a document without these icons will start the process of scanning or e-signing the document.

Using the Document Table

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When you hover over a document you will see multiple icons on the right side. You can click on the icons to perform the tasks described below.

Coverage ID Card	Not Received	TEST, FRONT DESK	-	-	
eHIPAANoticeOfPrivacyPractices.html	Not Received	TEST, FRONT DESK	-	-	
eSSNDisclosureConsent.html	Not Received	TEST, FRONT DESK	-	-	



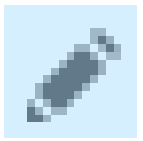
View the document.



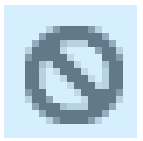
E-sign the document.



Scan the document.



Edit the document. **Note:** See the next page for more information on this function.




Expire/Inactivate the document. **Note:** Not commonly used.

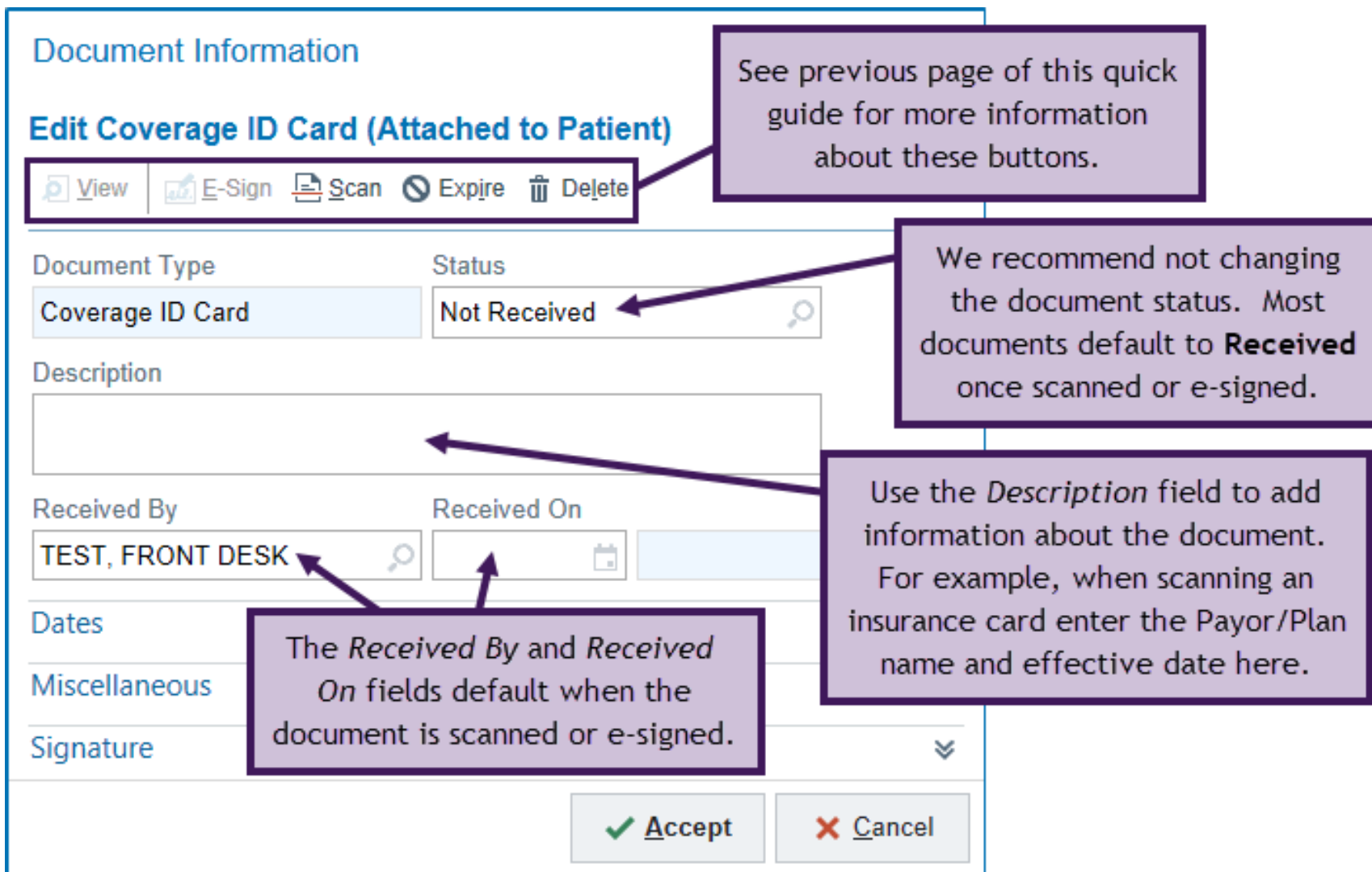


Delete the document. **Note:** Cannot be undone.

Using the Document Table






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When you click on the Edit button  or when you add a document, the *Document Information* window appears.



Document Information

Edit Coverage ID Card (Attached to Patient)

 View |  E-Sign |  Scan |  Expire |  Delete

Document Type: Coverage ID Card

Status: Not Received

Description:

Received By: TEST, FRONT DESK

Received On:

Dates

Miscellaneous

Signature

Callout 1: See previous page of this quick guide for more information about these buttons.

Callout 2: We recommend not changing the document status. Most documents default to **Received** once scanned or e-signed.

Callout 3: Use the *Description* field to add information about the document. For example, when scanning an insurance card enter the Payor/Plan name and effective date here.

Callout 4: The *Received By* and *Received On* fields default when the document is scanned or e-signed.