How to Scan a Document into Client's Record

SmartCare search words in **bold**.

To scan, you need a scanner attached to your workstation. Scanning will use your scanner's software but save it in SmartCare.

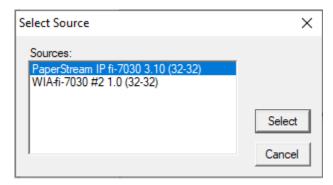
- 1. With the client record open, click the Search icon.
- 2. Type **Scanning** in the search bar.
- 3. Select Scanning (My Office) from the search results.



- 4. a. To scan a single document, click the "Scan New Images" icon.
- b. To scan multiple documents in a batch, click the "Start Scan Upload" button.

canning (0)							Start B	atch Uplo	ad Start Ba	tch Scan 🖹	a 🏦	* *
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Associated With	ID	Name	Record Type	Crea	ted ⊽	Effective	Sca	nned By	Status	BatchId	Provider	
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5. Select your scanner.



6. To scan a single sided document, insert the document face down into your scanner. In the Simple tab under Paper Source, select Feeder Front Side. Click Scan.

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7. Select Finish when done.

🚯 PaperStream IP	×
To continue scanning, load the document on the scanner. Scanning will start automatically.	
Finish	

8. Ensure the document scanned correctly and all pages are visible.

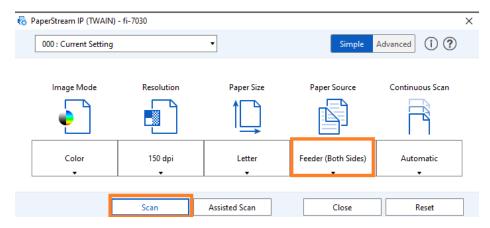
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Record Type Labs		Description MH Laboratory Report	t	Progr	am SCA Clinic Adult (Grand)-05/31/2023 👻
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9. Select Client Medical Records. Ensure client MR# & Client Name auto fills. (If not, click the ellipsis button which will take you to the client search window.) Enter in effective date (date of document.) Select Record Type from the drop-down. Enter naming convention in the Description field. Select the Program. Click Save and X to close.

Note: we have asked CalMHSA to include our document types in the Record Type drop-down menu. (Admin/Correspondence, Hard Copy Signed Docs, Legal, etc.) We are awaiting their response.

Scanned Medical Record Detail	i 🖬 🗈 🖬 Savo 🗙
Cliant (Medical Records) V 1026 Cat, Kitty Record Type Labs V Description MH Laboratory Report Image Details	C Effective 06/06/2023
Whole Page Zoom In Zoom Out Delete Reload Reload All Insert Page(s) Append Page(s) Edit Image Page(s)	age1 V of 1

10. To scan a double sided document, insert the document face down into your scanner. In the Simple tab under Paper Source, select Feeder (Both Sides). Click Scan.



11. Select Finish when done.

Note: For multi-page documents-when the document starts to scan, it will pull the last page of the document into the scanner first.

🐻 PaperStream IP	×
To continue scanning, load the document on the scanner. Scanning will start automatically.	
Finish	

Follow steps 8 & 9 from above to attach the document to the client record.

How to Scan a Document into Client's Record Without a Scanner

- 1. With the client open, click the Search icon.
- 2. Type **Scanning** in the search bar.
- 3. Select Scanning (My Office) from the search results.

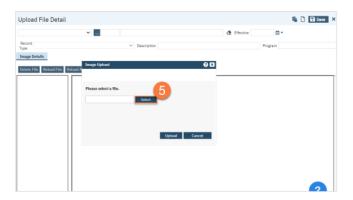


4. You can upload documents one at a time or as a batch.

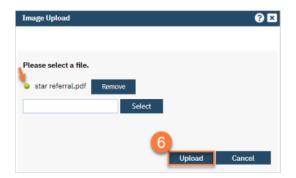
- a. To upload a single document, click the "Upload New Images" icon.
- b. To upload multiple documents in a batch, click the "Start Batch Upload" button.

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5. Choosing upload will open the Upload File Detail screen. This will include a pop-up. Click Select to find the file on your computer. (It must be a PDF.)



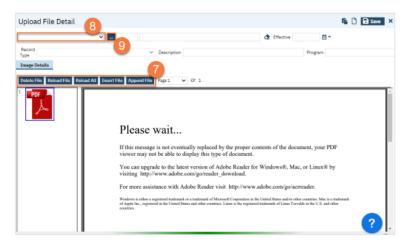
6. Once it's ready, a little green circle will appear next to it. Click Upload.



7. This will show you the PDF. Confirm you've uploaded the correct document. Make corrections as needed using the buttons at the top of the PDF viewer.

8. Select Client Medical Records from the first dropdown menu.

9. If you do not have the client record open, you can click on the ellipsis button to find the client. (The client search will open. Search to find the client. Click Select when you've located the client.)



- 10. Select the Record Type.
- 11. Enter the description of the document.
- 12. Enter the program the document is associated with.
- 13. Enter the Effective date of the document.
- 14. Click Save.

Upload File Detail		13	🕼 🗋 🖬 Save 🛛 🗙
Client (Medical Records)	239 Training Manual	▲ Effective ■	14
Record Type All Record Types Image Details	10 Description	Program Outpatie	12
Delete File Reload File Reload All Insert Fi	le Append File Page1 🗸 Of 1		
	viewer may not be able to display this ty You can upgrade to the latest version of visiting http://www.adobe.com/go/read	Adobe Reader for Windows®, Mac, or Linux® by er_download.	
	For more assistance with Adobe Reader	visit http://www.adobe.com/go/acrreader.	

How to view scanned documents in the record

We have found two ways to view scanned documents in the client's chart.

1. The first way is with the client open, search **Documents** and select **Documents (Client)**.

ocuments (41)							c	reate Document.		●☆
All Authors	♥ 06/08/2022	All Statuees		v Due	in X daya	♥ 0 External Document		Apply Filter		
Document/Description	Group Name	Effective	Status	Ver.	Due Date	Author	To Co-Sign	Others to Sign	Shared	Associated Doc
Adult Screening Tool		04/28/2023	Signed	1		Seaman, Kimbert			Yes	Add
Consent For Email Communication		04/28/2023	Signed	1		Seaman, Kimbert			Yes	Add
Consent For Telehealth		04/28/2023	Signed	1		Seaman, Kimbert			Yes	Add
Consent For Text Communication		04/28/2023	Signed	1		Seaman, Kimbert			Yes	Add
Consent To Treat		05/02/2023	Signed	1		Seaman, Kimbert			Yes	Add
Consent To Treat		04/28/2023	Signed	1		Seaman, Kimbert			Yes	Add
Coordinated Care Consent		05/16/2023	Signed	1		Seaman, Kimbert			Yes	Add
Coordinated Care Consent		05/05/2023	Signed	1		Seaman, Kimbert			Yes	Add
Coordinated Care Consent		05/05/2023	Signed	1		Seaman, Kimbert			Yes	Add
Coordinated Care Consent		05/05/2023	Signed	1		Seaman, Kimbert			Yes	Add
CSI Standalone Collection		05/16/2023	Signed	1		McGuire, Kathy			Yes	Add
CSI Standalone Collection		05/02/2023	In Progress	1		Seaman, Kimbert			Yes	Add
Lab Orders (MH Laboratory Requisition Form)		05/09/2023	Completed	1		Seaman, Kimbert			Yes	Add
Lab Orders (MH Laboratory Requisition Form)		05/09/2023	Completed	1		Seaman, Kimbert			Yes	Add
Progress Note (Client Non Billable Srvc Must Docu		06/02/2023	In Progress	1		Joaquin, Tara Leij			Yes	Add
Progress Note (Comprehensive Multidisciplinary Ev		05/30/2023	To Do	1		MH CLINICIAN2,			Yes	Add
Progress Note (Consult)		06/07/2023	To Do	1		Joaquin, Tara Leij			Yes	Add
Prostress Note (Consult)		06/06/2023	To Do	1		Weissman Jennit			Ves	hhū

2. This will take you to a document list page which shows all documents (forms and scanned items in the client's record), where you can enter search parameters and click apply. You can sort the list alphabetically by clicking the Document/Description header. You can open a document by clicking on the document name.

The second way to view scanned documents only:

1. With the client open, click the Search icon.

- 2. Type **Scanning** in the search bar.
- 3. Select Scanning (My Office) from the search results.



- 4. Set the parameters.
 - a. Select Client Medical Records in the All-Associations field. Ensure correct client is displaying; if not, click the ellipsis button to go to the client search screen. You can leave All Record Types or specify specific records you are searching for.
 - b. Ensure Show Scanned/Uploaded is selected in this field. In the All-Scanning Staff field, you can view documents scanned by all staff or individual staff. You can view all statuses or select completed or not completed.
 - c. You will need to enter either effective dates or created between dates to specify the date range you are looking for. (Similar to AZ's filters) Note: Effective date is the date of the document. Created date is the date the document was scanned into the record.

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Client (Medical Records)	~	1026 Co	it, Kitty		All Record Types			 Apply Fi 	lter		-	
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Effective Dates Between		🛱 🔻 And	⊟ *	Cre	ated Between 04/0	7/2023 🗎 🕈 And	05/17/2023	≕				
Associated With	ID	Name	Record Type 🛆	Cre	ated Effective	Scanned By	Status	BatchId	Provider	Insurer	<u> </u>	
Client (Medical Records)	1026	Cat_Kitty	Lab Orders (MH Labor	05/	09/2023 05/09/20	23 Seaman, Kimb	Completed				*	
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d. Once the parameters are set, click Apply Filter.

5. You can see the document description/ naming convention by placing your cursor over the name in the record type column.

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PSC-35 Reporting List Page	Client (Medical Records)	1026 <u>Cat. R</u>	🗤 s 🔤 So	anned N	ledica	l Recor	d (Healtl	n Quest	ionnair	e)		
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6. You can view the scanned document by clicking on the document icon.

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Associated With	ID	Name	Record Type	Crea	ated ⊽	Effective	Scanned By	Status	BatchId	Provider	Insurer

7. Once the scanned document opens, you can print the scanned document by selecting the print icon.

Associated With: Cat, Kity Record Type: Scanned Medical Record (Test Scan) Effective Date: $05/03/2023$ $\square \overline \vee \overline Draw \vee \overline \overline Read aloud - + \overline 1 of 5 \overline \overline \overline \overline \overline $	View Images		د
□ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □	Associated With: Cat, Kitty	Record Type: Scanned Medical Record(Test Scan) Effect	tive Date: 05/03/2023
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How to attach scanned documents to SmartCare forms

- 1. With the client open, search **Documents**. Select **Documents (Client).**
- 2. Locate the completed SmartCare form you want to associate a scanned document with.
- 3. Click the Add link in the Associated Documents column.

ocuments (41)									Create Document.		
All Authors 🗸	All Documents	~	All Statuses		/ Due i	n X days	v (Other 🔹	Apply Filter		
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Document/Description Scanned Medical Record(RH Au Release of Information Progress Note : Memain Recits A Progress Note : (Mental Health A	Assessment by Non-Ph	Name	06/08/2023 06/08/2023	Status Completed Signed To Do	_		Author So Co, Test Fron So Co, Test Fron	To Co-Sign	Others to Sign	Yes Yes	Add Add

4. The Associate Documents window will open. Locate the scanned document.

ocuments Pre	view						
All Clinicians	~	All Docun	nents	✔ All Statuses	~		Apply Filter
Effective From 0	6/08/2022 🛗 🕶	Effective	То	•			
Add All	Document		Effective	Status	Aut	nor	
Add	Release of Informatio	n	06/08/2023	Signed	So Co,	Test Front Office	
Add	Scanned Medical Rec	ord	06/08/2023	Signed	So Co,	Test Front Office	
Add	UMDAP Financial Ass	essment	05/22/2023	Signed	So Co,	Test Front Office	
Add	Release of Informatio	n	05/18/2023	Signed	So Co,	Test Front Office	
Add	Release of Informatio	n	05/18/2023	Signed	So Co,	Test Front Office	
Add	Release of Informatio	n	05/17/2023	Signed	Seama	n, Kimberly	

5. Click on the document name to open and ensure it is the correct document you want. If it is correct, click the Documents tab.

eociate Documents Accounted Documents (2 icuments Preview	8) OK Cancel
Client: Cat, Kitty	Effective Date: 06/08/2023 Author: So Co, Test Front Office Status: Signed
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Client ID: 1026	
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6. Click Add. Click OK.

Associate	e Documents (28)			OK Cancel	
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Add All	Document	Effective	Status	Author	
\dd	Release of Information	06/08/2023	Signed	So Co, Test Front Office	
\dd	Scanned Medical Record	06/08/2023	Signed	So Co, Test Front Office	
Add	UMDAP Financial Assessment	05/22/2023	Signed	So Co, Test Front Office	1
Add	Release of Information	05/18/2023	Signed	So Co, Test Front Office	
\dd	Release of Information	05/18/2023	Signed	So Co, Test Front Office	
\dd	Release of Information	05/17/2023	Signed	Seaman, Kimberly	
Add	Coordinated Care Consent	05/16/2023	Signed	Seaman, Kimberly	
\dd	CSI Standalone Collection	05/16/2023	Signed	McGuire, Kathy	
	PSC-35 (California Pediatric	0.000	61 - I		-

7. This will take you back to the Documents screen and the Associated Document will be shown. You can click the on the associated document name to view the scanned document.

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ocuments (41)								C	reate Document.		 ●☆★★
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Document/Description		Group Name	Effective ∇	Status	Ver.	Due Date	Author	To Co-Sign	Others to Sign	Shared	Associated Documents
Scanned Medical Record/BH Auth	orization to Disclos		06/08/2023	Completed	1		So Co. Test Fro	nt	1	Yes	Add
Release of Information			06/08/2023	Signed	1		So Co, Test Fro	int (Yes	Scanned Medical Record
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Progress Note (Mental Health As	essment by Non-Ph	-	06/07/2023	To Do	1		Joaquin, Tara I	.eig		Yes	Add
Progress Note (Consult)			06/07/2023	To Do	1		Joaquin, Tara I	.eig		Yes	Add
Progress Note (Consult)			06/06/2023	To Do	1		Weissman, Jer	nif		Yes	Add
Progress Note (Consult)			06/03/2023	To Do	1		Weissman, Jer	nnif		Yes	Add
Progress Note (Client Non Billabl	e Srvc Must Docu		06/02/2023	In Progress	1		Joaquin, Tara I	eig		Yes	Add
Progress Note (Comprehensive N	ultidisciplinary Ev		05/30/2023	To Do	1		MH CLINICIAN	12,		Yes	Add
Progress Note (Consult)			05/25/2023				MH CLINICIAN			Yes	Add

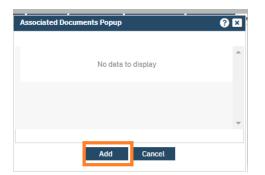
8. If you want to attach one scanned document to multiple completed forms, you will go to **Scanning** (My Office). Locate the scanned document and click on the created date.

canning (8)									3	lart Batch Upl	Start	Batch Scan	2		îr 🔺
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Client (Medical Records)	1026	Cat, Kitty	Lab Orders (MH Labor	D5/	09/2023	05/09/2023	Seama	in, Kimb	Completed				*		
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Client (Medical Records)	1026	Cat, Kitty	Scanned Medical Reco	05	03/2023	05/03/2023	So Co,	Test	Completed						
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9. The Scanned Medical Detail screen will open. Click on the Associate Documents icon.

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Scanned Medical Record Detail				lî 🗋 🗋 🖬 Save 🗙
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Record Type Scanned Medical Record BH Authorization to Disclose PHI (hard copy signature)	Program	SCA 0	Clinic Adu	ult (Grand)-05/31/2023 💙
Image Details				
Whole Page Zoom In Zoom Out Delete Reload Reload All Insert Page(s) Append Page(s) Edit Image Page 1 v of 1				
Litty Cot 6/8/2023 Kard Copy syncture & 6/8/202	3 ≮	La'	-	

10. A pop-up will open. Click Add.



11. The Associate Documents screen will open. Click on the form name and ensure it is the correct form you want.

All Clinicians	✓ All Docur	nents	~	All Statuses	*			Apply Filter
Effective From	06/08/2022 🛱 - Effective	То	=					
Add All	Document	Effective		Status		Author		
Add	Release of Information	06/08/2023		Signed		So Co, Test Front Office		
dd	Scanned Medical Record	06/08/2023		Signed		So Co, Test Front Office		
dd	Progress Note	06/02/2023		In Progress		Joaquin, Tara Leigh		
dd	Referral Document	05/25/2023		In Progress		Seaman, Kimberly		
kdd	UMDAP Financial Assessment	05/22/2023		Signed		So Co, Test Front Office		
dd	Release of Information	05/18/2023		Signed		So Co, Test Front Office		
dd	Release of Information	05/18/2023		Signed		So Co, Test Front Office		
dd	Release of Information	05/17/2023		Signed		Seaman, Kimberly		
dd	Coordinated Care Consent	05/16/2023		Signed		Seaman, Kimberly		
List of Assoc	ciated Documents							
Document			Effective		Status		Author	

12. If it is correct, click the Documents tab.

ocuments Preview	nts (31)		0K Cancel
Client: Cot, Kitty	Effective Date: 06/08/2023	Author: So Co, Test Pront Office	Status: Signed
≔ ∀ ~ ∀	Draw 🗸 🖉 🖽 Read aloud	- + 🖸 🗌 of 4	🤉 🗈
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Client Inform	Social AUTHORIZATION TO OBTA	•	
Client Inform Client Name:	Social AUTHORIZATION TO OBTA ation Cat, Kitty	•	Client ID:

13. Click the Add button next to the form. It will now be displayed in the List of Associated Documents section.

All Clinicians	✓ All De	ocuments 👻	All Statuses	Apply Fill	ter
Effective From	06/08/2022 🛗 🕶 Effect	ive To			
Add All	Document	Effective	Status	Author	
ldd	Release of Information	06/08/2023	Signed	So Co, Test Front Office	-
dd	Scanned Medical Record	06/08/2023	Signed	So Co, Test Front Office	
dd	Progress Note	06/02/2023	In Progress	Joaquin, Tara Leigh	
dd	Referral Document	05/25/2023	In Progress	Seaman, Kimberly	
dd	UMDAP Financial Assessme	ent 05/22/2023	Signed	So Co, Test Front Office	
dd	Release of Information	05/18/2023	Signed	So Co, Test Front Office	
dd	Release of Information	05/18/2023	Signed	So Co, Test Front Office	
dd	Release of Information	05/17/2023	Signed	Seaman, Kimberly	
dd	Coordinated Care Consent	05/16/2023	Signed	Seaman, Kimberly	
	Coordinated Care Consent ated Documents	05/16/2023	Signed	Seaman, Kimberly	

14. You may repeat these steps to add the scanned document to multiple forms. Once done, click OK.

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15. X out to close the Scanned Medical Record Detail screen. Go to **Documents (Client)** and this is how it will display.

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ocuments (41)							Cr	reate Document		 ●☆★초
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Last 1 Year	From 06/08/202	2 🛗 ▼ To 06	6/08/2023	• •	Include	External Documen	ts			
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	Name		Completed	Ver. 1 1	Due Date			Others to Sign		

16. If you click the Multiple link in the Associated Documents column, a pop-up will display showing the associated forms. You can click to open each form.

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	Add/Modify	y Cancel	
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How to remove associated documents from SmartCare forms (if attached in error)

1. In the Documents screen, click on the document/description.

Document/Description	Group Name	Effective ▽	Status	Ver.	Due Date	Author	To Co-Sign	Others to Sign	Shared	Associated Documents
Progress Note (Client Non Billable Srvc Must Docu		07/11/2023	To Do	1		Yarnold, Katelyn A			Yes	Add
Coordinated Care Consent		07/11/2023	In Progress	1		Seaman, Kimberl			Yes	Progress Note
Progress Note (Psychosocial Rehabilitation Group	Music Shari	07/10/2023	Signed	1		Novikoff, Danica			Yes	Add

2. Click this icon.



3. Select Associated Documents.

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	Authorship	_
l	Print Amendment Requests	s
ľ	View Message	
	Send	
ľ	Acknowledge	
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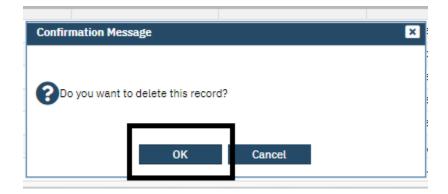
4. Click Add/Modify.

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5. Click the X to remove.

All Clinicians	~	All Documents	*	All Statuses	*	Apply	Filter
ffective From	07/11/2022	Effective To	≡ -				
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	Progress Note	07/10/20	023	Signed	Novika	ff, Danica	
bb	Progress Note	07/09/20)23	Signed	Bousk	os, Jordan	
<u>1d</u>	Progress Note	07/07/20)23	Signed	Novika	tt, Danica	
54	Progress Note	07/07/20	023	Signed	Novika	ff, Danica	
<u>1d</u>	Progress Note	07/06/20)23	Signed	Novika	off, Danica	
<u>1d</u>	Progress Note	07/06/20	023	Signed	Kathe	man, Charles Morris	
50	Progress Note	07/05/20	023	Signed	Johns	on, Julia Dannon	
<u>dd</u>	CCD MH	06/15/20	023	Signed	Provid	er, Conversion	

6. Click OK.



7. Then click OK in the Associated Documents screen.

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Add	Progress Note		07/09/2023		Signed		Bouskos, Jordan			
Add	Progress Note		07/07/2023		Signed		Novikoff, Danica			
Add	Progress Note		07/07/2023		Signed		Novikoff, Danica			
Add	Progress Note		07/06/2023		Signed		Novikoff, Danica			
Add	Progress Note		07/06/2023		Signed		Katherman, Charles Mo	rris		
Add	Progress Note		07/05/2023		Signed		Johnson, Julia Dannon			
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Document				Effective		Status		Author		

8. X to close the document.

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Coordinated Care Consent	🗳 🚺 🖄 😌 🚥 🏯 🎝 🎫 i 🗰 🖶 🗅 📑 Sama 🗙							
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By signing this form below, you will allow certain organizations and individuals to use and share your health and other	Open Claim Line Detail es related to							
your treatment and care. They will be able to share your information through an electronic health record system main								
Authority called SmartCare.	- ··· ·							