

Docuware – Uploading and Viewing Scanned Documents

Uploading Scanned Documents into Docuware

Prior to uploading the document into Docuware, follow current procedures for scanning documents.

- 1. Log into Clarity
 - a. If uploading documents for multiple patients, select **Patient > Document Management**



- b. If uploading documents for a specific patient, select Treatments
 > Real-Time Charting > Pre-Treatment tab
 - i. NOTE: A patient must first be selected then it will bring you directly to that patient's scanned documents.



Pre Treatment N	lurse Assessment	Treatment	Medications / Imn	Phy Rounding	Post Treatment			
Broadway Kidney Ce 🗸	Date 6/10/2019		History 🗸			Clos	e Wind	low
	-			User	:		Logou	ıt
Item	Value			Notes		Done	Time	User
Document Management	Patient Documents							
Setup								
Location	* Broadway Kidney	С 🗸						

2. Search for your patient—either by MRN, First, or Last Name



3. Once you select the correct patient, in the upper-right hand corner, click the **Upload Document** link.

Last, First - MRN	V						
Patient: Document Date	C Document Type	Document Name	Upload By	Upload Date	Edited By	Edited Date	Upload New Document
				×		· · · · · · · · · · · · · · · · · · ·	Clear
	Edited Da	ite	<u>Uploa</u>	d Nev	v Docun	nent	
		~	Clear				

4. Once you select the **Upload New Document** link, set the following information:

a. Document Date

i. Select the Document Date using the calendar

Document Date:	ient	L
Document Type:		~
Document Name:		~
Upload File:	Select a file or drag a file here	Browse
* All fields are required	1.	
Submit C	ancel	

- b. **Document Type –** Select the **Document Type** using the dropdown menu
 - i. The **Document Type**(s) available are common and succinct.

Document Date:	6/6/2019	
Document Type:	Initial Orders	$\overline{}$
	Imaging	
Document Name:	Immunization	
	Initial Orders	
Upload File:	Lab Results	/se
	Laboratory Results	
	MD Notes	
	Non-ESRD Acute	~
* All fields are required	1	

c. **Document Name –** Select the **Document Name** using the drop-down menu

Document Date:	6/6/2019	
Document Type:	Initial Orders	~
Document Name:	Initial Orders - ESRD	$\overline{}$
	Initial Orders - Acute	
Upload File:	Initial Orders - ESRD	/se
	Initial Orders - ESRD_PD	

5. Use the **Browse** button to select the scanned document from where you saved the file

NORTHWEST

Kidney Centers



		Update New Document	t			×
	Document	Document Date:	6/6/2019	~		
		Document Type:	Initial Orders		~	
	Transplant					
	HIPAA - Sie	Document Name:	Initial Orders - ESRD)	~	
	Consent - S	Unload File:	Calact a file or drag	- filo horo	Browso	1
	Standing O	opioud rife.	Select a file of drag a	a me nere	Browse	
	Standing O					
	Standing O					
	Standing O	* All fields are required.				
	Standing O	·				
	Standing O	Submit Cance	el			
	Chandling O					
Choose File	to Upload					
$\leftarrow \rightarrow \cdots$	🏷 🛗 🔸 This	s PC > Documents				✓ Ö Seard
Organize 🔻	New folde	r				
📥 Ouisk as		Name		Date modified	Туре	Size
	cess at			No items mat	ch vour search.	
Deskto	ade at				,	
Docum	entr 🖈					
E Picture						
h Music						
Videos						
ConeDrive	2					
💻 This PC						
i Network						

6. After selecting the document to upload, click the **Submit** button to complete the upload to Docuware

* All fields are r	equired.
Submit	Cancel



Search and View Scanned Documents in Docuware

To review documents that have already been uploaded to Docuware, follow these steps:

- 1. Log into Clarity and go to **Patient > Document Management**
- 2. Search for your patient—either by **MRN**, **First**, or **Last Name**



- 3. Filter by any of the following items:
 - a. Document Date
 - b. Document Type
 - c. Document Name
 - d. Upload By
 - e. Upload Date
 - f. Edited By
 - q. Edited Date

Document Date	Document Type	Document Name	Upload By	Upload Date	Edited By	Edited Date
×						~

4. After finding the document, click the **View** link in the far-right column

Upload By	Upload Date	Edited By	Edited Date Upload New Document		
	×			<u>Clear</u>	
Last, First	05/02/2019	Last, First	05/15/2019	View Edit Delete	
Last, First	02/22/2019	Last, First	03/26/2019	View Edit Delete	
Last, First	02/22/2019	Last, First	03/26/2019	View Edit Delete	



Edit or Delete Scanned Documents in Docuware

You may edit or delete documents that you have uploaded to Docuware, follow these steps:

- 1. Log into Clarity and go to **Patient > Document Management**
- 2. Search for your patient—either by **MRN**, **First**, or **Last Name**



- 3. Filter by any of the following items:
 - a. Document Date
 - b. Document Type
 - c. Document Name
 - d. Upload By
 - e. Upload Date
 - f. Edited By
 - q. Edited Date

Document Date	Document Type	Document Name	Upload By	Upload Date	Edited By	Edited Date
				×		Ľ

4. After finding the document, click the **Edit or Delete** link in the farright column and perform the action needed