



Audience: All users, including Physicians, Nurses, and Clinical Support Staff

The **Documents Viewer** is an OnBase tool accessed through Epic. The **Documents Viewer** takes the scanned and uploaded images located in the **Media** tab in **Chart Review** and reconfigures the data in a more streamlined and intuitive layout. **NOTE: Any PAS, Ambulatory, or HOD department documents scanned prior to November 11th, 2018 will not be in OnBase. To find these documents, you will need search in the **Media** tab of **Chart Review**.**


Contents

Accessing the OnBase Documents Viewer	2
OnBase Documents Viewer Components	3
Browsing by Tab	4
Configuring Your Personal Tab	5
Adding Document Types to the Personal Tab	5
Removing Document Types from the Personal Tab	6
TimelineMode	7
Accessing Timeline Mode	8
Displaying Documents in Timeline Mode	8
Filters	9
Filtering Documents	9
Filtering by Date Range	10
Entering a Custom Date Range	10
Saving a Filter	11
Applying a Saved Filter	12
Removing a Filter	12
Viewing Documents	13
ViewerToolbarsandNavigation	14
Viewer Control Toolbar	14
Annotations Toolbar	15



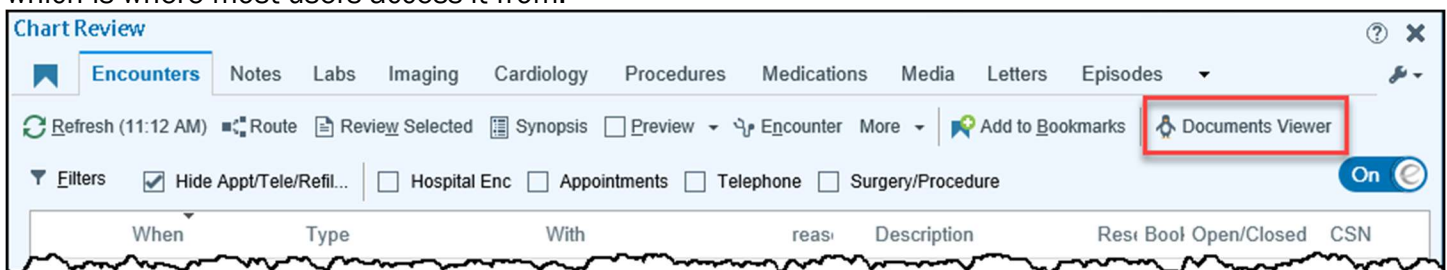
Accessing the OnBase Documents Viewer

The OnBase Documents Viewer can be accessed from several different activities in Epic.

To access the OnBase Documents Viewer, click the  Documents Viewer button from any of the following locations in Epic.

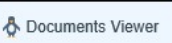
- Media Manager
- Encounters tab in Chart Review
- Media tab in Chart Review
- Prep for Surgery
- Pre-Op Consult

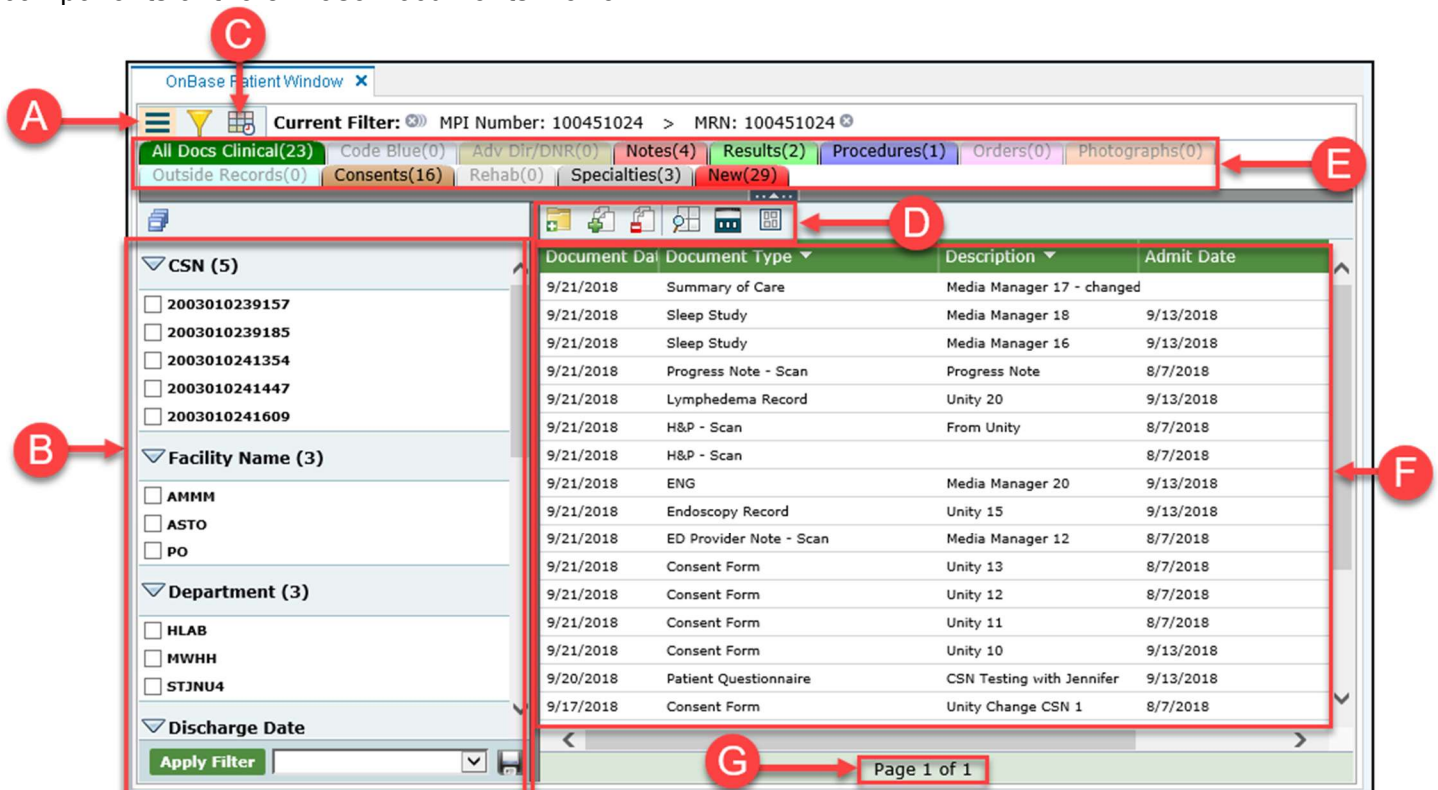
The following screenshot shows the **Documents Viewer** button from the **Encounters** tab of **Chart Review**, which is where most users access it from.





OnBase Documents Viewer Components

After clicking , the OnBase Documents Viewer opens inside of Epic. Review the following components of the OnBase Documents Viewer.



- Main Menu** – Depending on your rights, the main menu may allow you to access search options, patient lists, or administrative functions.
- Filter** – The **Filter** section allows you to filter the current record to display a subset of documents.
- Show TimeLine Mode Button** – The Show Timeline Mode button opens the timeline view, which allows you to browse the patient's scanned or uploaded images in a calendar/timeline view.
- Document List Toolbar** – The document list toolbar includes tools to help you manage and browse documents in the document list.
- Tabs Pane** - Tabs help organize documents into different categories, similar to tabs on a physical chart. Click a tab to view its contents in the document list.
- Document List** – The document list shows documents assigned to the currently selected tab, excluding any documents that have been filtered out.
 - The default sort order is:
 - Document Date (newest first)
 - Document Type (A-Z)
 - Description (A-Z)
 - Users can change the sort order by clicking on the column heading.

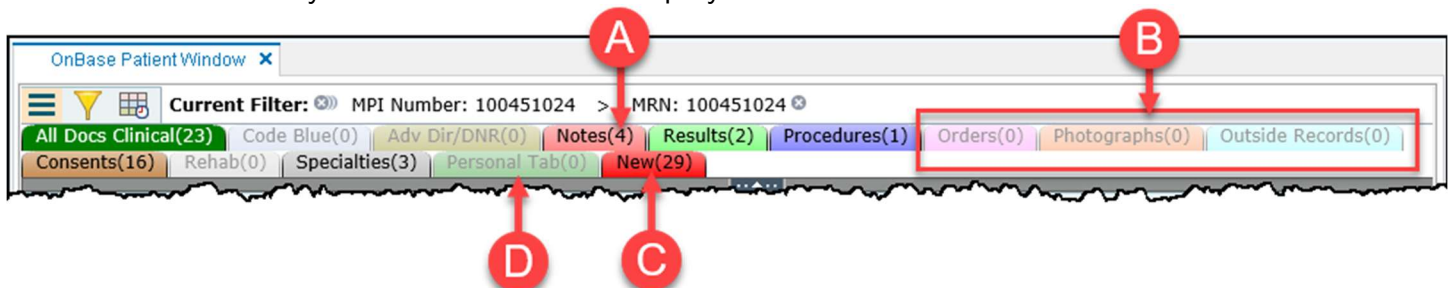
OnBase – Navigating Documents Viewer in Epic

- To Open a document, double – click it from the documents list. The document is displayed in the document viewer, and the documents list moves to the left side of the window.
- g. **List Paging Toolbar** - A paging toolbar is displayed below every list, allowing you to see which page of the list you are viewing and to navigate to other pages in the list.

Browsing by Tab

The OnBase Documents Viewer displays a list of tabs across the top of the window. Like tabs on physical charts, tabs in the OnBase Documents Viewer organize documents into different categories.

Click a tab to display its contents in the document list. If a filter is currently applied, then only documents that satisfy the filter criteria are displayed.



- Tab Document Counts:** Each tab may display the number of documents it contains.
- Empty Tabs:** If empty tabs are displayed, then their names and colors are faded to differentiate them from tabs that contain documents.
 - If you select a tab containing zero documents, then the document list displays the message No Documents.
- New Documents Tab:** The red New tab allows you to quickly view documents that have been added to the record since you viewed it last. These documents also are displayed in their respective tabs.
 - The New tab is emptied only after you have viewed the New tab and logged out. When you log in and view the record again, the New tab will display only documents that have been added since the last time you viewed it.
 - If you have never viewed the New tab for a patient's record, then the New tab displays all documents in the record.
- Personal Tab:** The green Personal Tab provides quick access to Document Types you work with frequently. For example, if you work with documents that usually occur on different tabs, you can set up the Personal Tab to display all the documents in one location.
 - The Personal Tab is available only after you set it up in User Options.

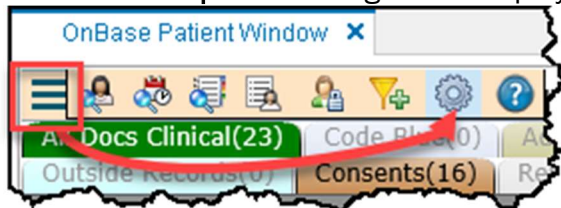


Configuring Your Personal Tab

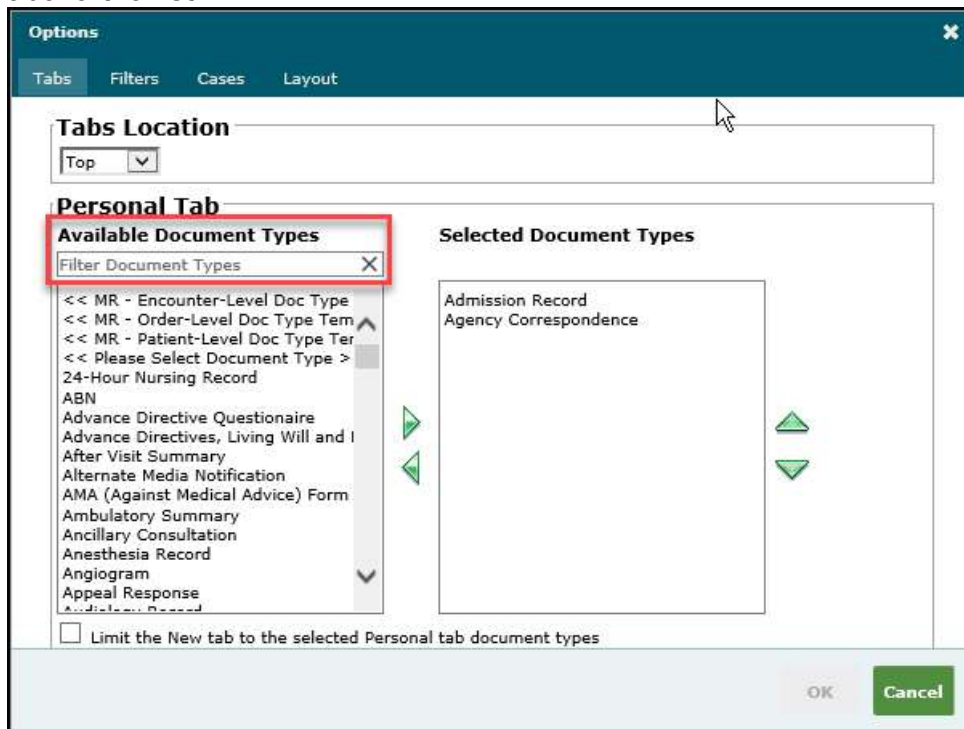
Adding Document Types to the Personal Tab

For the Personal Tab to be available, you must configure it to contain one or more Document Types.

1. To add Document Types to your Personal Tab, rest your pointer over the main menu icon and click **Options**.
 - a. The **Options** dialog box is displayed.



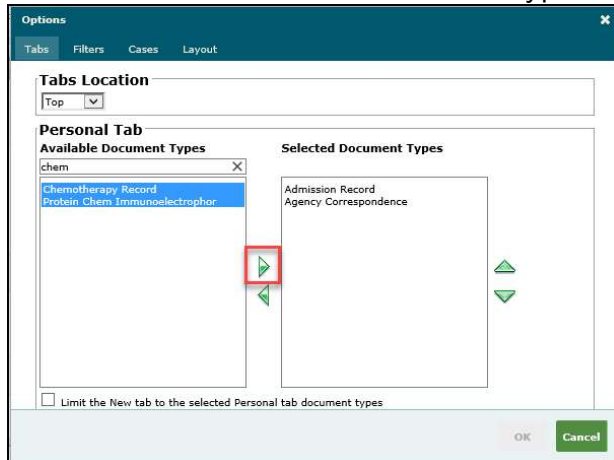
2. Select the Document Types you want to include in the Personal Tab from the **Available Document Types** list.
3. To filter the list of available Document Types, type part of the Document Type name in the field above the list.



Tip: To select multiple Document Types, press **Ctrl** as you select each one, or **Shift**-click to select multiple Document Types in a row.

OnBase – Navigating Documents Viewer in Epic

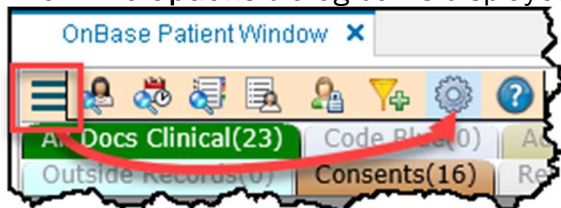
- Click the **Add** button. The Document Types are added to the **Selected Document Types** list.



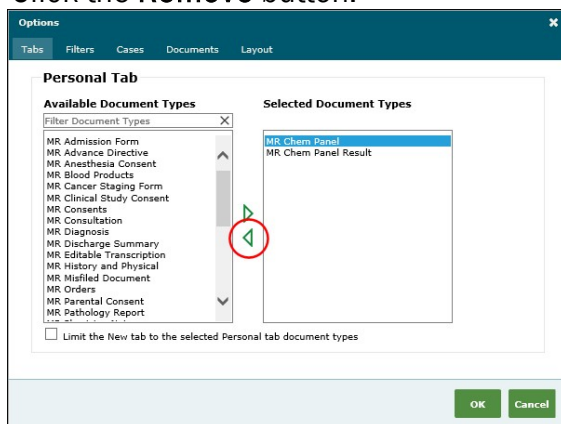
- Click **OK** to save the new Personal Tab configuration.

Removing Document Types from the Personal Tab

- To remove a Document Type from your Personal Tab, rest your pointer over the main menu icon and click **Options**.
 - The **Options** dialog box is displayed.



- Select a Document Type from the **Selected Document Types** list.
- Click the **Remove** button.

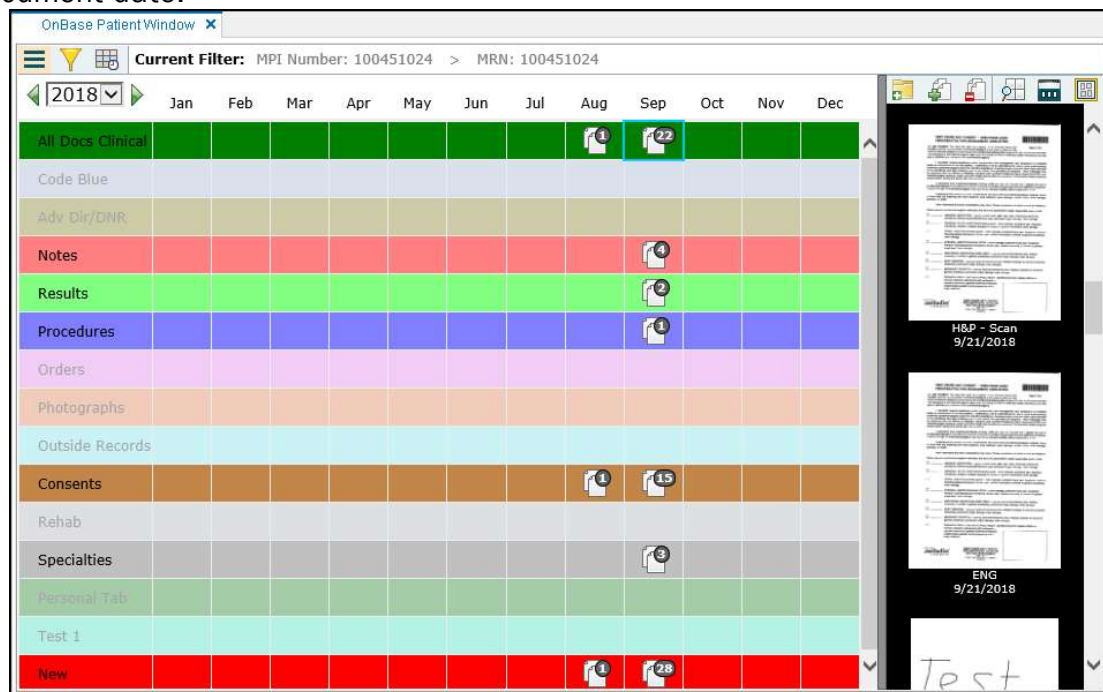


- Click **OK** to save the new Personal Tab configuration.



Timeline Mode

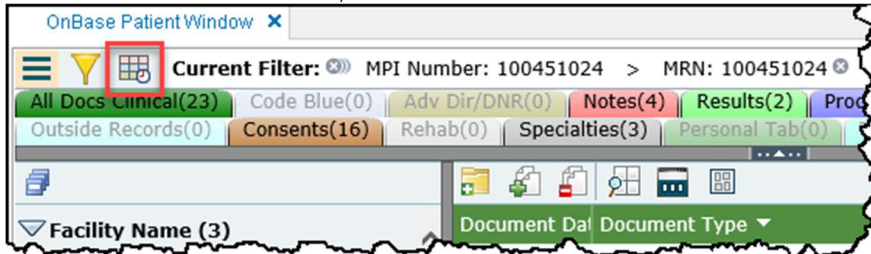
Timeline mode plots documents on a timeline using either the clinically relevant date (if available) or the document date.



OnBase – Navigating Documents Viewer in Epic

Accessing Timeline Mode

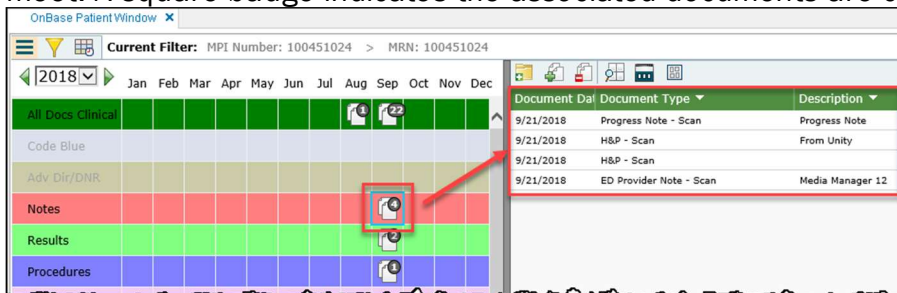
To access timeline mode, click the **Show Timeline Mode** button.



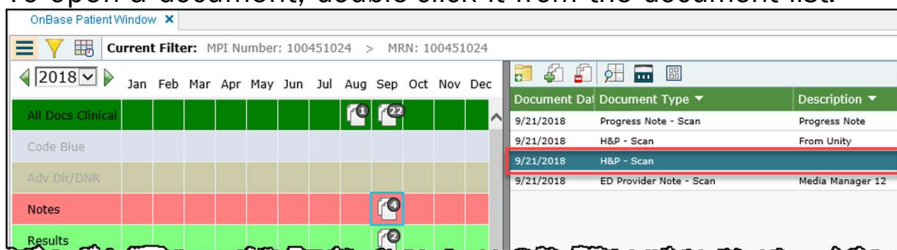
Note: If the last record you viewed was displayed in timeline mode, the next record you view is also displayed in timeline mode. The Documents Viewer preserves timeline mode as a preference across login sessions.

Displaying Documents in Timeline Mode

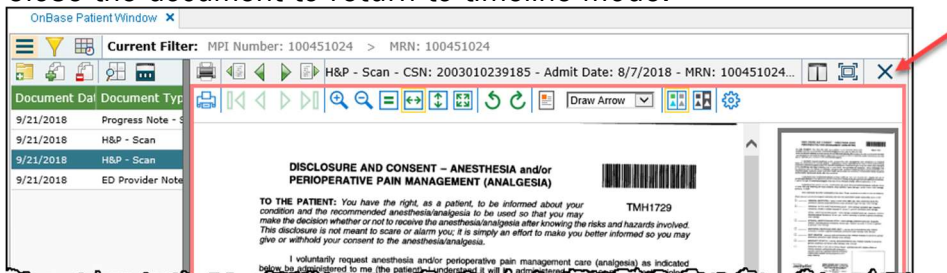
To display the documents within a tab for a date range, click the badge where the tab and date range meet. A square badge indicates the associated documents are currently displayed in the document list.



To open a document, double-click it from the document list.



Close the document to return to timeline mode.





Filters

Filters allow you to work with a limited subset of documents that satisfy specific criteria. Currently applied filters are displayed next to the **Filter** button in the main toolbar.

Filtering Documents

1. To filter documents in a record, using the filter pane, select the criteria to use in the filter.
2. Click the **Apply Filter** button.
 - a. The document list is filtered to reflect the selected options.
 - b. If **No Documents** is displayed in the document list, then you have filtered out either all documents in the current tab or all documents in the record.

The screenshot shows a filter pane with the following sections:

- CSN (5)**
 - ☐ 2003010239157
 - ☒ 2003010239185
 - ☐ 2003010241354
 - ☐ 2003010241447
 - ☐ 2003010241609
- Facility Name (3)**
 - ☐ AMMM
 - ☐ ASTO
 - ☒ PO
- Department (3)**
 - ☐ HLAB
 - ☒ MWHH
 - ☐ STJNU4
- Discharge Date**
 - ☒ All Dates
 - ☐ Previous Year

At the bottom, there is a green **Apply Filter** button. A red circle with the number '1' has arrows pointing to the checkboxes in the CSN, Facility Name, and Department sections. A red circle with the number '2' has an arrow pointing to the Apply Filter button.

Note: For filters that are not based on dates, available options include only values that exist within the current document set. For example, if the record is only showing documents from the cardiology department, then **Cardiology** is the only option available for the **Department** filter.



Filtering by Date Range

Date-based filters provide the following options:

Option	Description
All Dates	Select to apply no date criteria for this filter.
Previous Year	Select to filter out documents where the date is older than one year.
Previous 3 Months	Select to filter out documents where the date is older than 3 months.
Previous Month	Select to filter out documents where the date is older than 1 month.
Previous Week	Select to filter out documents where the date is older than one week.
Date Range	Enter a custom date range. See Entering a Custom Date Range on page 32 .

Entering a Custom Date Range

Use the **Date Range** option to enter a custom date range.

Note: The date format must match the standard date format for your locale. For example, if your workstation locale is set to English (United States), the expected format is mm/dd/yyyy or m/d/yyyy.

1. Select Date Range.
2. Click the calendar button next to the From Date or To Date field to display a calendar.
3. Double-click the desired date to enter it.
4. The following examples illustrate how to achieve the intended date range.

Desired Result	Sample Date Values
Only display documents with the specified date. From Date: desired date To Date: same as From Date The sample values shown will include documents with a date of 08/07/2015 .	<div><div>From Date</div><div>08/07/2015</div><div></div><div>To Date</div><div>08/07/2015</div><div></div></div>
Only display documents within a set of dates. From Date: start date To Date: end date The sample values shown will include documents from 01/01/2015 up to and including 08/07/2015 .	<div><div>From Date</div><div>01/01/2015</div><div></div><div>To Date</div><div>08/07/2015</div><div></div></div>

OnBase – Navigating Documents Viewer in Epic



<p>Only display documents going back to a specific date.</p> <p>From Date: start date</p> <p>To Date: blank</p> <p>The sample values shown will include documents with a date of 01/01/2015 or later.</p>	
<p>Only display documents up to a specific date.</p> <p>From Date: blank</p> <p>To Date: end date</p> <p>The sample values shown will include documents with a date up to and including 08/07/2015.</p>	

Saving a Filter

You can save filters for future use. Saved filters allow you to quickly access documents that satisfy specific criteria.

Note: A saved filter includes all filter criteria displayed in the main toolbar. If the record is currently filtered using a specific chart number or MRN, then the selected chart number or MRN is saved as part of the filter. In this case, the saved filter would be relevant only to the current patient's record.

1. To save a filter, filter the record using the criteria you want to save.
2. Click the **Apply Filter** button.
3. Click the **Save** button.

a. The **Save Filter** dialog box opens.



4. Enter the name of the filter in the **Filter Name** field.
5. Click **Save**.



Tip: Choose a descriptive name that reflects what the filter will display. For example, if the filter shows only outpatient chart documents from the Main Campus facility, you might name it Main Campus-Outpatient.



Applying a Saved Filter

You may have access to filters that you have saved or that an administrator has made available to you. If you have access to any saved filters, the **Load Saved Filter** drop-down is displayed at the top of the filter pane.

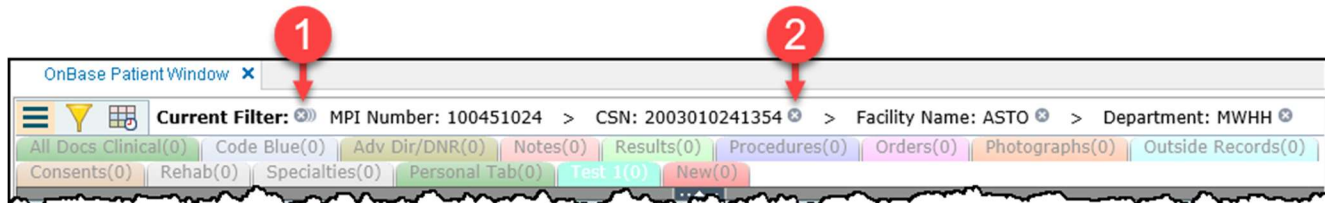
1. To apply a saved filter, select the filter from the **Load Saved Filter** drop-down.
 - a. The filter pane displays the criteria that will be applied with the selected filter.



Removing a Filter

Once applied, a filter remains in effect until you either remove it or close the browser window.

1. To remove all applied filters, click the **Clear All Filters** button in the **Current Filter** bar. **This button is available only when two or more filter criteria are in effect.**
2. To remove a specific filter, click the X displayed to the left of the filter's name.





Viewing Documents

Documents are displayed in the **Document Viewer**. From the **Document Viewer** you have access to toolbars, icons, and other graphics that indicate the presence of notes or annotations.

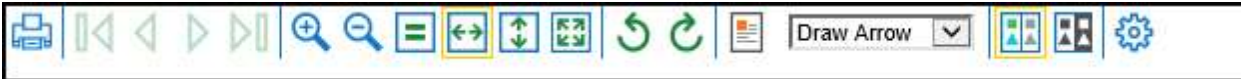
The screenshot displays the OnBase Document Viewer interface. At the top, a title bar reads "Progress Note - Scan - CSN: 2003010239185 - Admit Date:...". Below the title bar is a toolbar with various icons for document navigation and editing, including a "Redact Black" dropdown menu. The main document area shows a medical form titled "DISCLOSURE AND CONSENT - ANESTHESIA and/or PERIOPERATIVE PAIN MANAGEMENT (ANALGESIA)". The form includes a barcode, a patient information section, and a consent section. The consent section contains several paragraphs of text and a list of checkboxes for different anesthesia methods: GENERAL ANESTHESIA, REGIONAL BLOCK ANESTHESIA/ANALGESIA, SPINAL ANESTHESIA/ANALGESIA, and EPIDURAL ANESTHESIA/ANALGESIA. A sidebar on the right shows a thumbnail of the document and a page number "1". At the bottom, a status bar indicates "Page 1 / 1" and "2 Note(s)".









Viewer Toolbars and Navigation





Several toolbars are available in the document viewer. Toolbar buttons are designed to make navigation and document management an easy, point-and-click operation.

Viewer Control Toolbar



The Viewer Control toolbar allows you to view the document more efficiently. Use the buttons to navigate within the document, resize and reorient the page, and print.

Button	Description
	Overlay applies an overlay to the document, if an overlay is present.
	Print displays the Print dialog box, if you have user rights to print the document.
	First Page displays the first page of the document.
	Previous Page displays the preceding page of a multi-page document.
	Next Page displays the following page of a multi-page document.
	Last Page displays the last page of the document.

Button	Description
	Enter a page number in the Go To Page field to jump directly to a specific page.
	Zoom In magnifies the view of a document, reducing the portion that is visible. Every zoom increases magnification by one third.
	Zoom Out reduces the magnification of a document, increasing the portion that is visible. Every zoom reduces magnification by one quarter.
	Actual Size displays the document in its actual size (as it is stored in OnBase). Clicking this button sets the magnification to 100%. Note: This zoom level differs from True Size, which takes the monitor's and image's DPI into account when displaying the image.



	Fit Width resizes the document page so that its width is the same as the width of the document display area.
	Fit Window resizes the document page so that the entire page is displayed in the document display area.
	Fit Height resizes the document page so that its height is the same as the height of the document display area.
	Options enables you to set viewer options.

Annotations Toolbar



The Annotations toolbar provides buttons for adding annotations or redactions to a document. You can show or hide the Annotations toolbar; by default, it may be hidden.

Note: If you are viewing a document that is locked by HIM, the options on the Annotations Toolbar are selectable, but do not perform any tasks.

Button	Description
	Toggle Redaction lets you draw black or white rectangles over a portion of the document. The color of the redaction is determined by the adjacent drop-down select list. You remain in redaction creation mode until you click the Toggle Redaction button again. This option is available for image documents only. You must have sufficient privileges to modify the document.
	Save Redactions saves any redactions that you have added to the document but not yet saved. You can save redactions only if the following requirements are met: <ul style="list-style-type: none">• You have sufficient privileges to modify the current document.• The document is configured to allow redactions.• The document has an image or text report format.
	Toggle Annotation enables you to add one or more annotations to the document by selecting the annotation(s) from the adjacent drop-down select list of available annotation types. You remain in annotation addition mode until you click the Toggle Annotation button again.

Note: Not all File Formats allow annotations. See your system administrator if the **Toolbars | Annotations** right-click option is not available.

