Audience: Clinical and Clinical Support Staff

OnBase is a document scanning application that is integrated with Epic. Use OnBase to scan documents from the Media Manager activity in Epic. When scanning documents in Media Manager, you can scan and assign the documents to the Patient, Encounters and Orders. Here's how to scan to orders from the Media Manager.

Contents

Scanning Levels

When scanning documents using the **Media Manager** activity in Epic, you can select where you want to attach the scanned documents, also known as the different *levels* to scan to. The three levels are Patient, Encounter and Order level.

- Patient Level – This scan can be accessed across all encounters and is not connected to a particular encounter. Example: Driver's License, Insurance Card, HIPPA Privacy Forms.
- Encounter Level – This scan can be accessed from a specific visit. Example: Notes and Consent Forms.
- Order Level – This scan is attached to an individual order and can complete the order with a result.

Scan a Document at the Order Level

1. Access the Media Manager (**Epic button>Patient Care>Media Manager**).
   a. The **Patient Lookup** window opens.
2. From the **Patient Lookup** window, search for your patient.
   a. The **Media Manager** activity opens and displays the patient's name and MRN, and defaults to the Patient level for scanning.
3. From the **Media Manager** activity, click the dropdown arrow and select **Choose an Order**.
   a. The **Order Search** window opens.

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4. From the **Order Search** window, filter your search using the **Search Options** section.
5. Click **Search**.
6. Select the Order in the list given.
7. Click **Accept**.
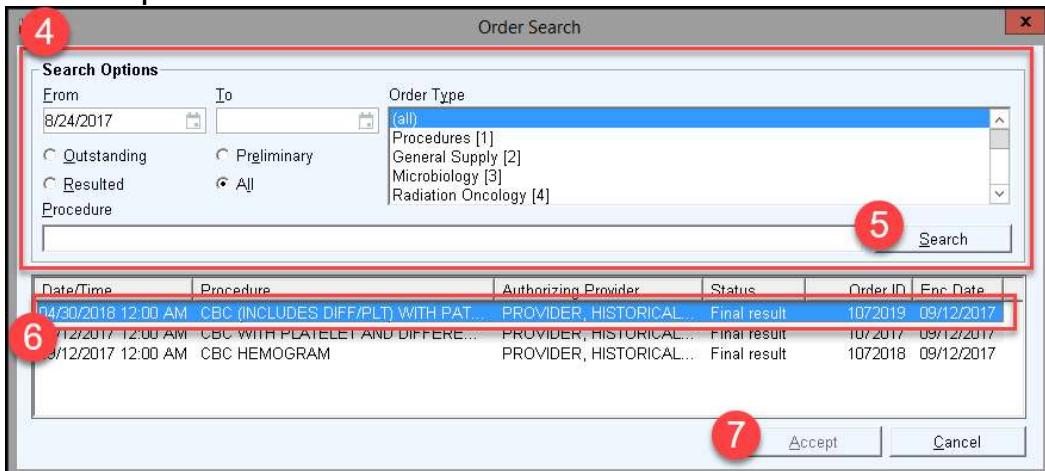
8. Note: In the **New files will be attached to** section, after you select your **Order**, the Order information is visible. Click **Scan** in the **Media Manager** activity toolbar.
   a. The **OnBase – Front Office Scanning** window opens.
   Note, Epic functionality freezex while OnBase is open.
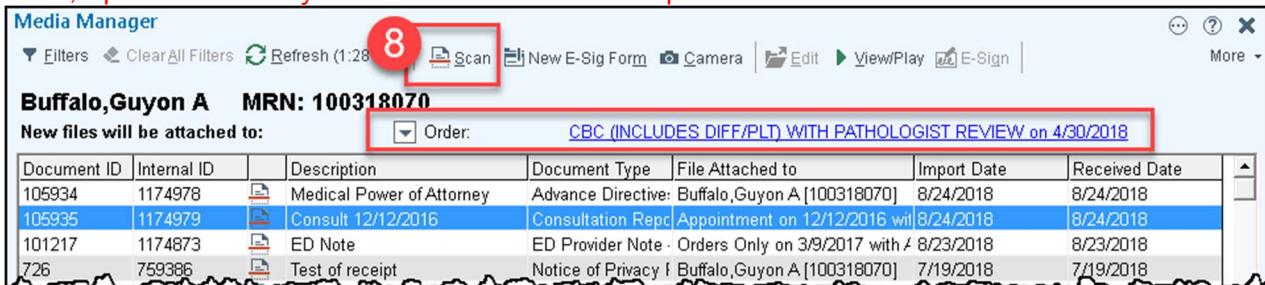
9. Insert your document into the scanner, then click one of these buttons in the **Store image as** section:
   a. **Scan ID Card** – Defaults to scan both sides of an ID card in color.
   b. **Scan Single Sided** – Scans one side in black and white.
   c. **Scan Duplex** – Scans double-sided in black and white.
   d. **Scan Color** – Scans double-sided in color.

Indexing Scanned Images

10. The scanned image(s) appears in the preview section. Select each thumbnail by single-clicking it (Note: When a thumbnail is selected, a white border will appear around the outer edge of it).
11. Click the **Select Document Type** button.
    a. The **Document Information** window opens.
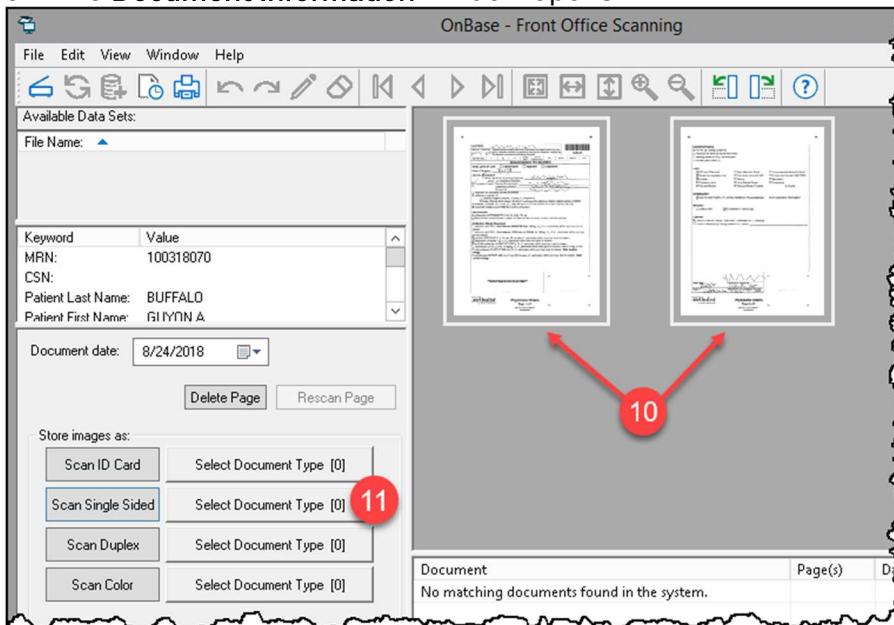
12. Select a **Document Type** from the list given. Note: The list only shows **Document Types** related to the Order Level.
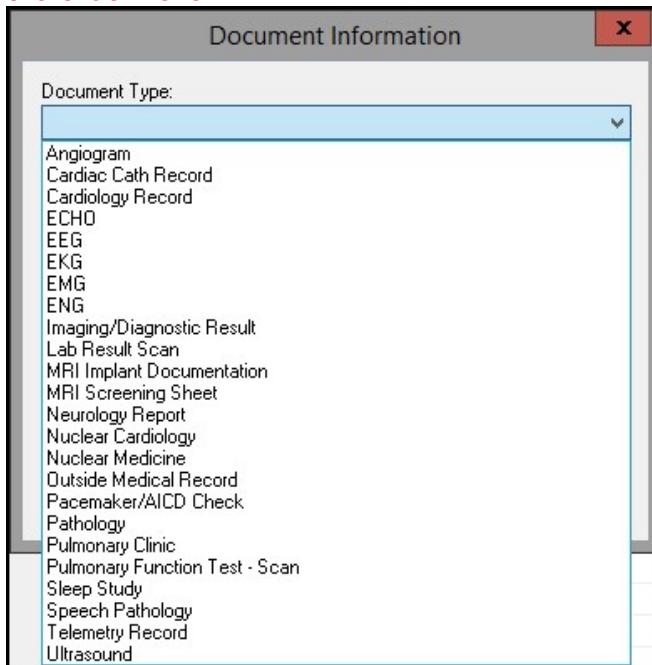
13. Type a description of the type of document you scanned. The description field should consist of the date of the document and any other short text further describing the document.
14. Click **OK**.
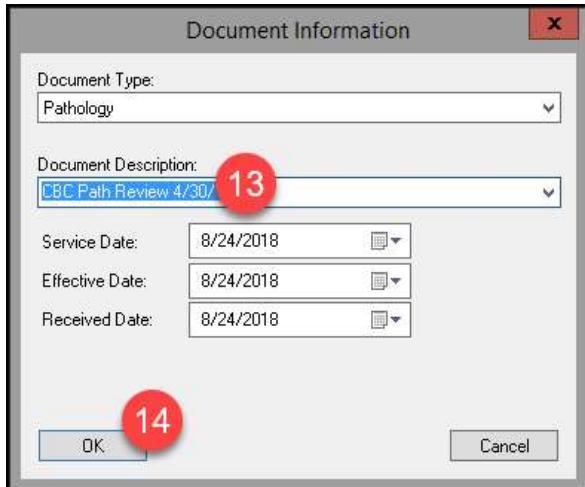
15. A green checkmark now appears over the **Select Document Type** button, indicating the images are indexed.
16. Click the **Upload Images** button.
    a. The **OnBase – Front Office Scanning** window closes.
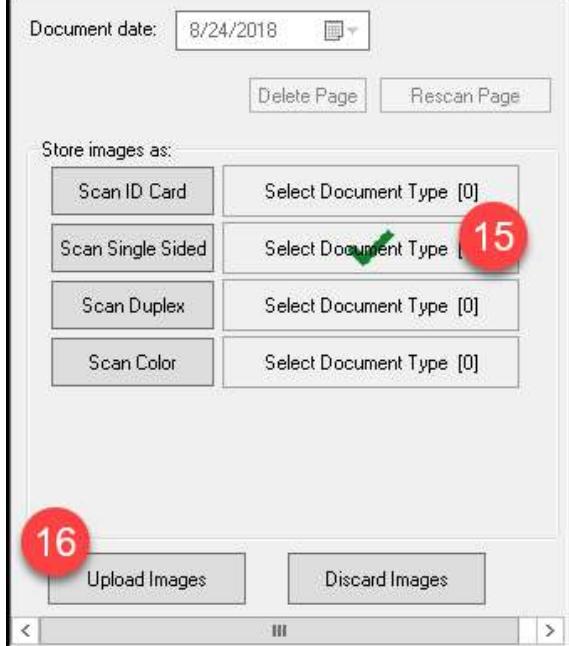
17. The images have now been scanned and uploaded and appear in the Media Manager list.
18. To view a document, double-click it in the list.

Troubleshooting

My Epic Screen is Frozen
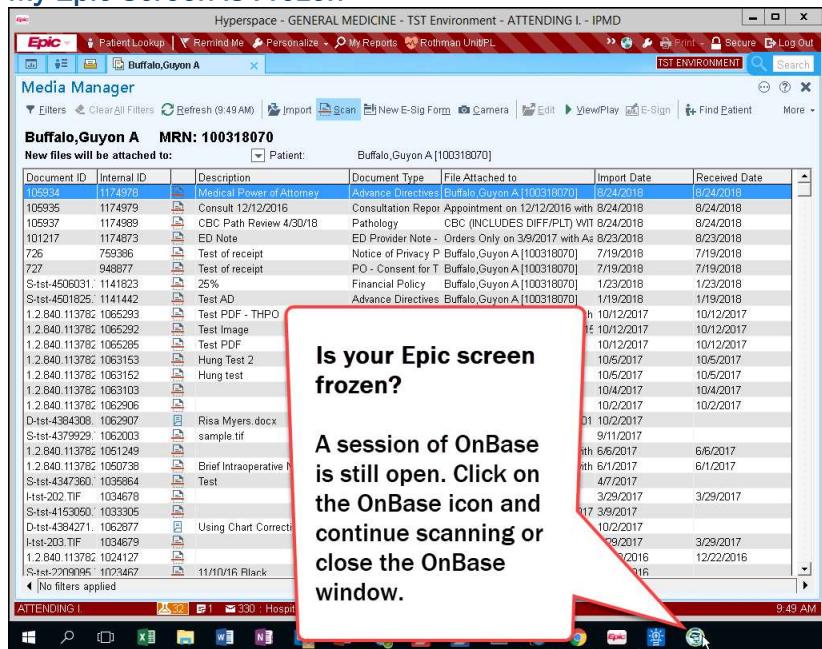
How Do I Zoom in and out on Images?

> **Want to Zoom in on an image even more?**
>
> Go to **View** and uncheck **Thumbnails** view.
>
> NOTE: Indexing only works in Thumbnails view, so you will need to change the view back to Thumbnails when you are done.
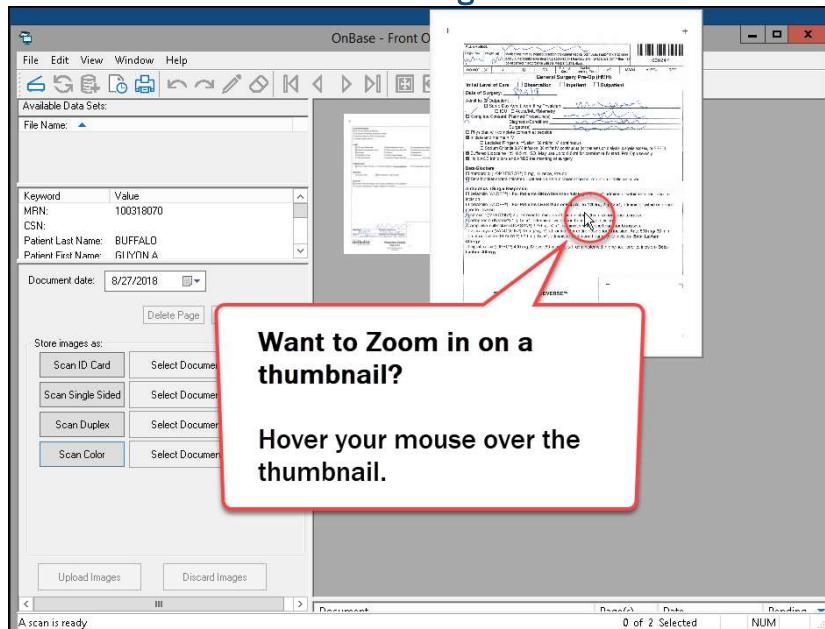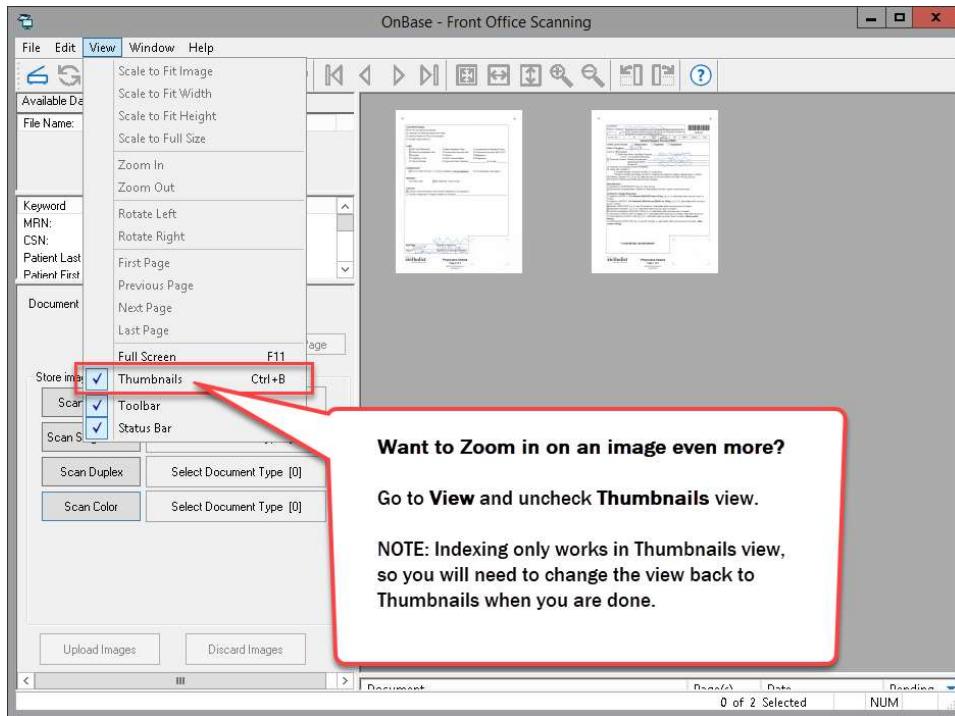
I Can't Close the OnBase Window

> **Front Office Scanning**
>
> ⚠ You must assign and upload or discard any documents in the current Data Set before exiting the application!
>
> OK

> **Did you scan or upload the wrong images, and now you want to close the OnBase - Front Office Scanning window, but you keep getting the following warning window?**
>
> Click the **Discard Images** button and then try closing the window.
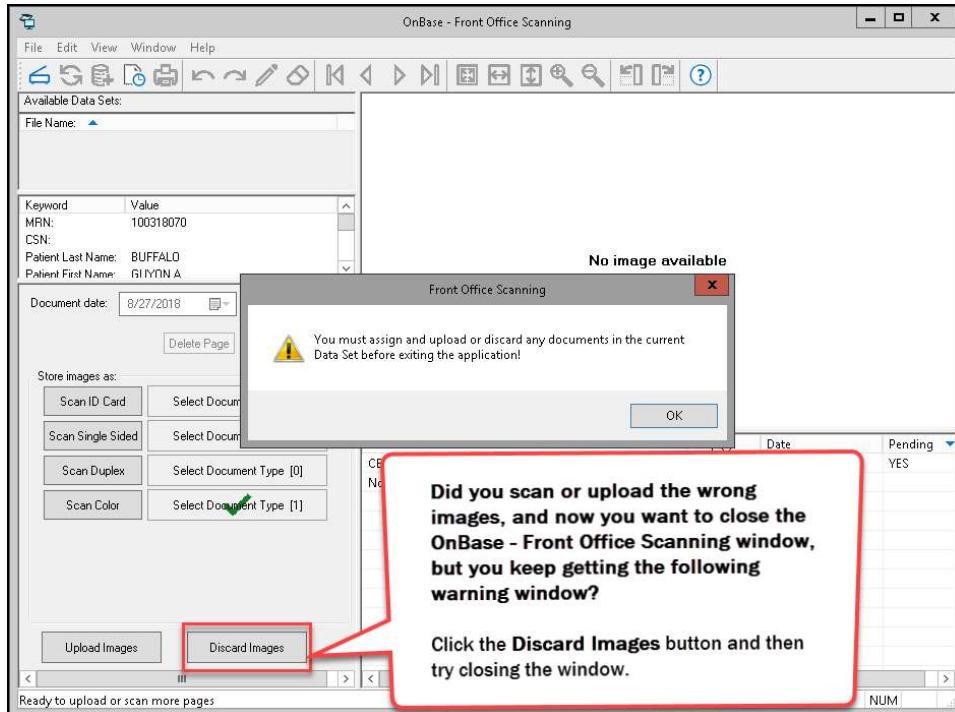
I Scanned or Uploaded Images to the Wrong Patient

I Indexed My Documents Incorrectly

When uploading or scanning images, you might assign the wrong **Document Type** or forget to add a **Description**. Follow the steps below to delete the documents and start over.

1. Verify the **Document Type** listed in the **Documents List**.
2. If the document type was added erouneously, click the **Discard Images** button.
   a. A window opens asking if you want to discard the documents.
3. Click **Yes.**
4. The scanned documents are removed and you can re-scan your documents.