



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.

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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.

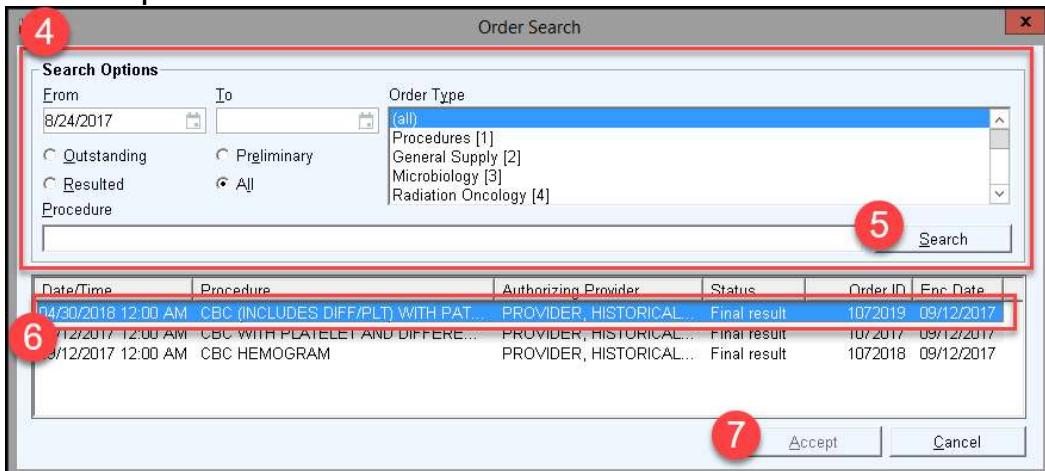
The screenshot shows the Epic Media Manager interface. At the top, there is a toolbar with buttons for Filters, Clear All Filters, Refresh (2:11 PM), Scan, New E-Sig Form, Camera, and a Print icon. Below the toolbar, the patient information is displayed: **Buffalo, Guyon A "Bison"** and **MRN: 100318070**. A red callout bubble with the number **3** points to a dropdown menu. The dropdown menu is titled "New files will be attached to:" and contains the following options: "Patient", "Choose an Encounter", "Choose an Order" (which is highlighted with a red box), "Create New Encounter", "Create New Order", and "Create New Consent". To the right of the dropdown menu, there is a table with columns for Document ID, Internal ID, and Description. The table contains several rows of data, such as "106772 1177247 Office H&P" and "106546 1176526 Office H&P".

OnBase

Scanning to Orders from Media Manager

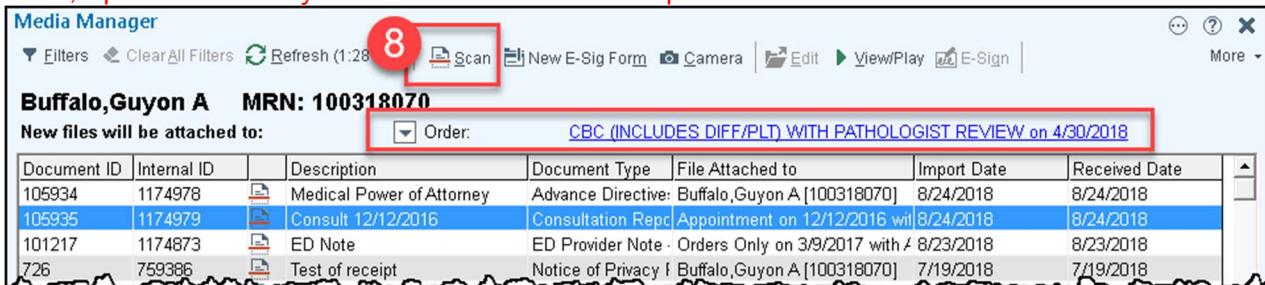


4. From the Order Search window, filter your search using the **Search Options** section.
5. Click **Search**.
6. Select the Order in the list given.
7. Click **Accept**.



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.



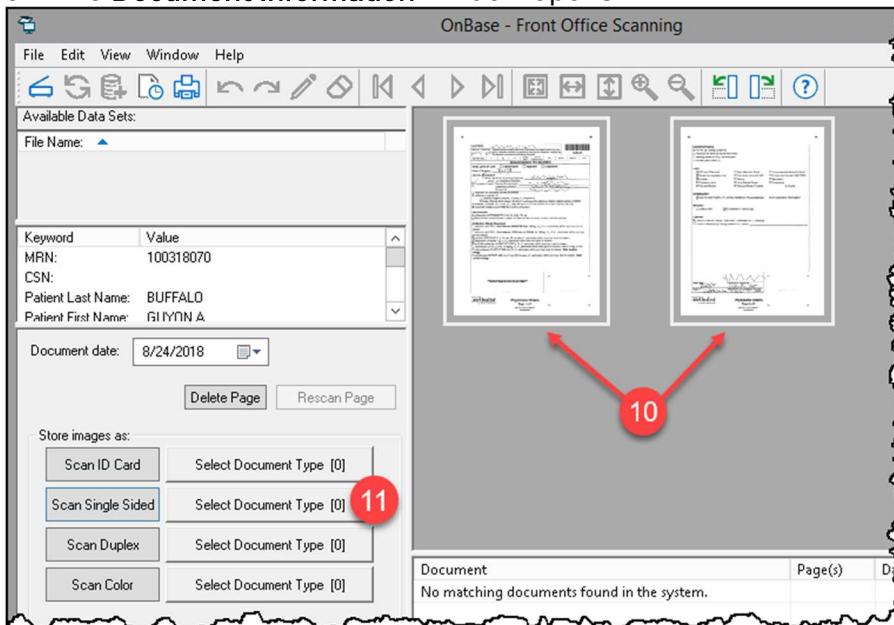
OnBase

Scanning to Orders from Media Manager

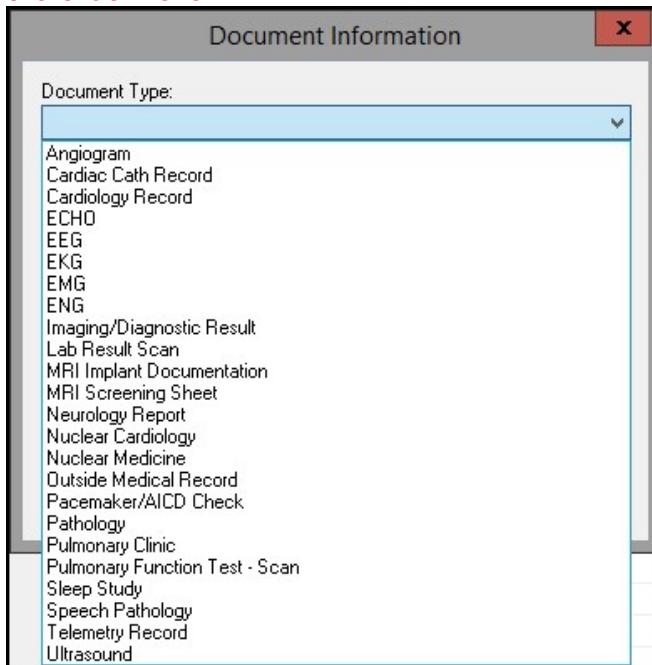


Indexing Scanned Images

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.

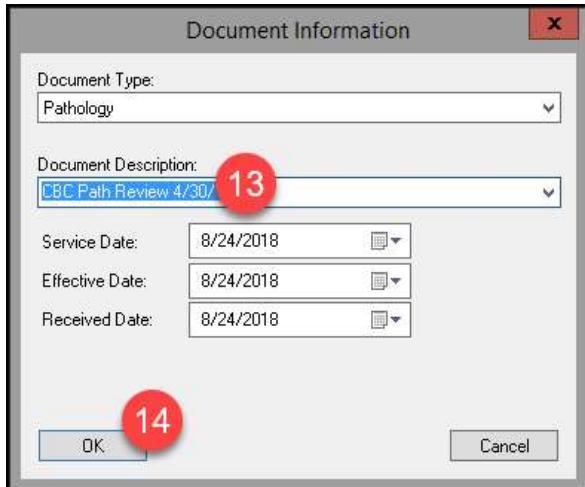


12. Select a **Document Type** from the list given. **Note: The list only shows Document Types related to the Order Level.**



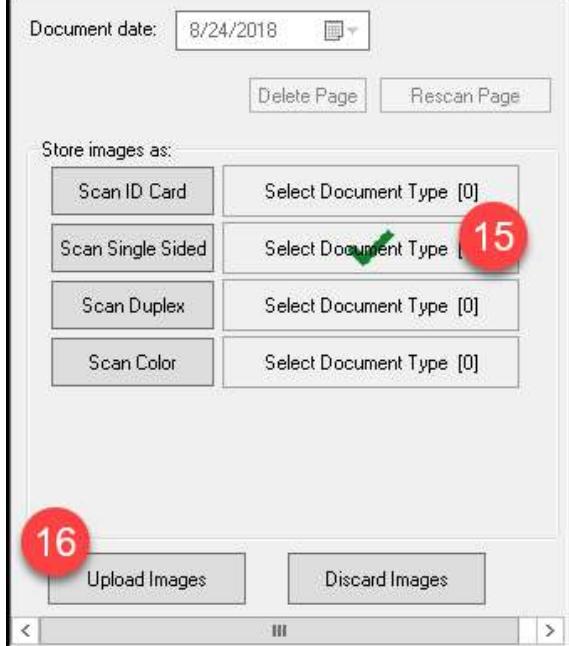


13. Type a description of the type of document you scanned. The description field should consist of the date of the document and any other short text further describing the document.
14. Click **OK**.



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.



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Scanning to Orders from Media Manager



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.

Media Manager

Filters Clear All Filters Refresh (1:57 PM) Scan New E-Sig Form Camera Edit View/Play E-Sign More

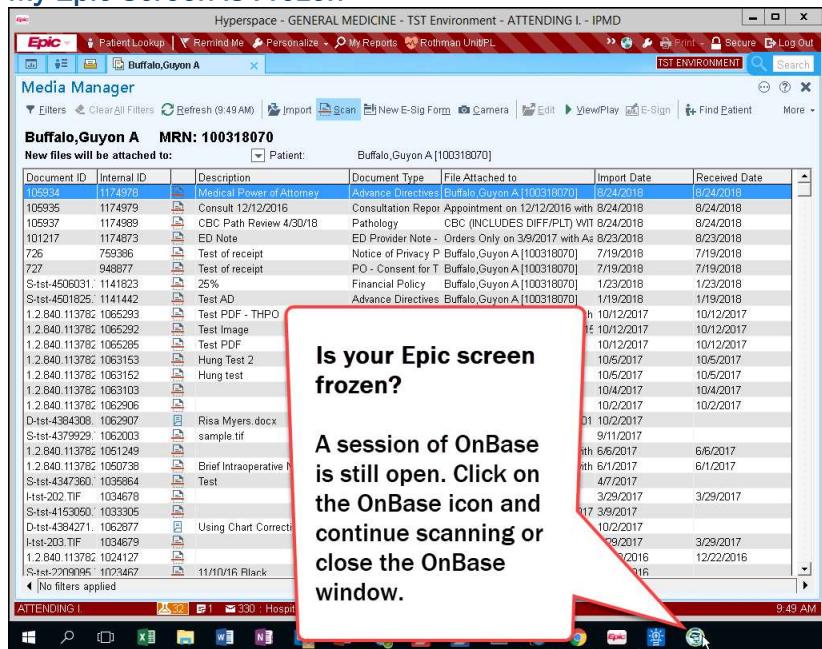
Buffalo, Guyon A MRN: 100318070

New files will be attached to: Order: CBC (INCLUDES DIFF/PLT) WITH PATHOLOGIST REVIEW on 4/30/2018

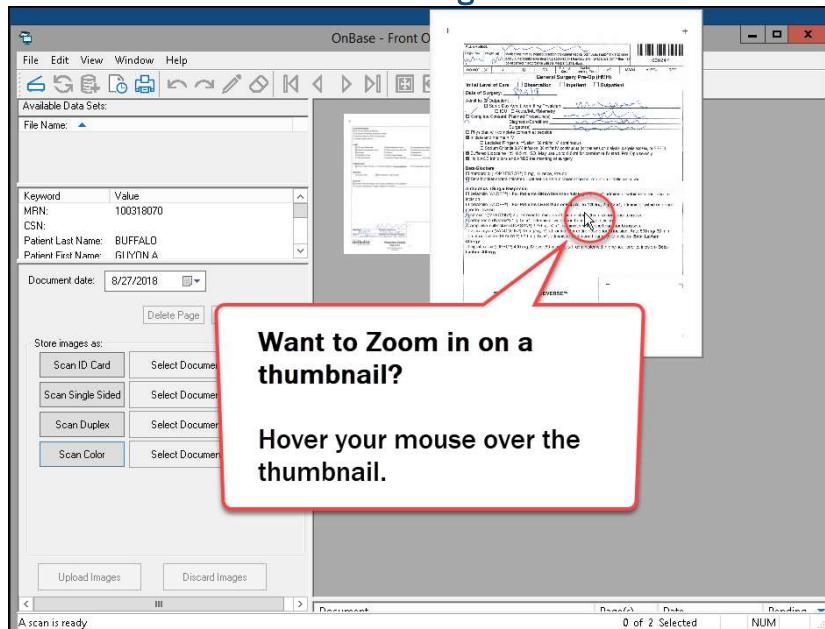
Document ID	Internal ID	Description	Document Type	File Attached to	Import Date	Received Date
105934	1174978	Medical Power of Attorney	Advance Directive: Buffalo, Guyon A [100318070]	8/24/2018	8/24/2018	
105935	1174979	Consult 12/12/2016	Consultation Repr. Appointment on 12/12/2016 with 8/24/2018	8/24/2018	8/24/2018	
105937	1174989	CBC Path Review 4/30/18	Pathology	CBC (INCLUDES DIFF/PLT) W/	8/24/2018	8/24/2018
101217	1174873	ED Note	ED Provider Note - Orders Only on 3/9/2017 with 8/23/2018	8/23/2018	8/23/2018	

OnBase Scanning to Orders from Media Manager

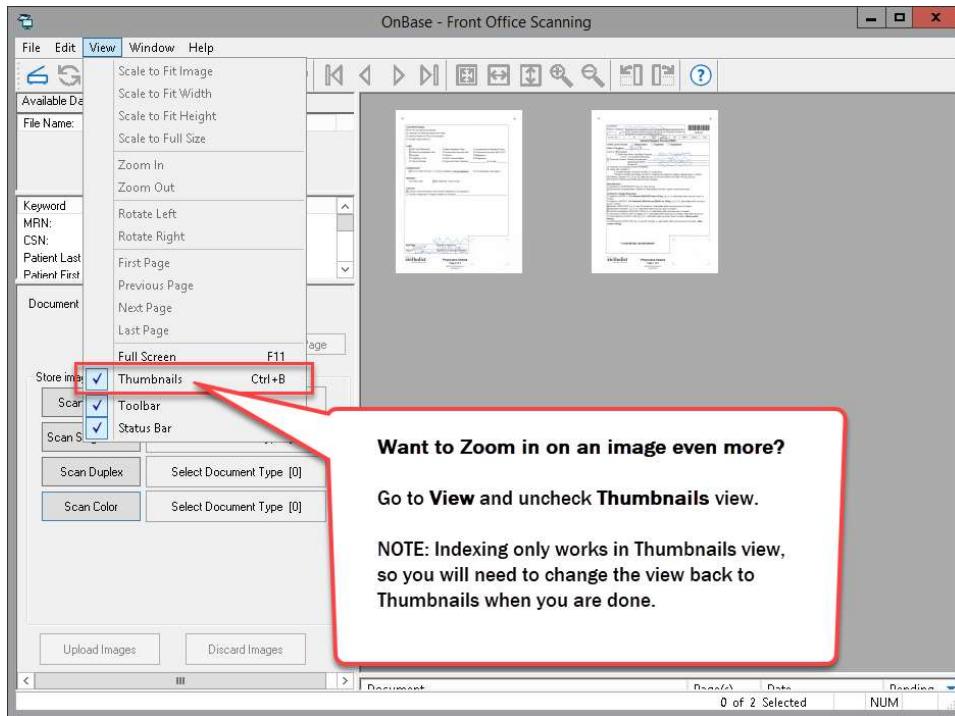
Troubleshooting My Epic Screen is Frozen



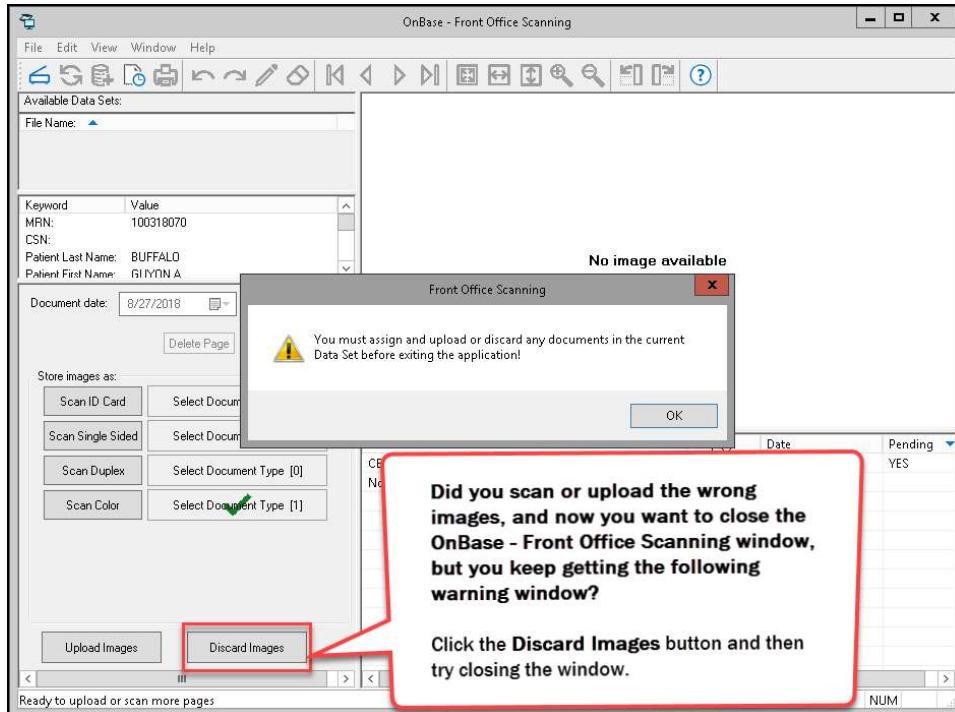
How Do I Zoom in and out on Images?



OnBase Scanning to Orders from Media Manager



I Can't Close the OnBase Window



OnBase Scanning to Orders from Media Manager



I Scanned or Uploaded Images to the Wrong Patient

Hyperspace - GENERAL MEDICINE - TST Environment - ATTENDING I. - IPMD

Patient Lookup Remind Me Personalize My Reports Rothman Unit/PL

Submit Chart Correction Request Search

RN: 100318070

Patient: Buffalo, Guyon A [100318070]

Description	Document Type	File Attached to	Import Date	Received Date
Policy 1000.011	Financial Policy	Buffalo, Guyon A [100318070]	8/27/2018	8/27/2018
Test	Legal	Buffalo, Guyon A [100318070]	8/27/2018	8/27/2018
Medical Po		Buffalo, Guyon A [100318070]	8/24/2018	8/24/2018
Consult 12		Buffalo, Guyon A [100318070]	8/24/2018	8/24/2018
CBC Path I		Buffalo, Guyon A [100318070]	8/24/2018	8/24/2018
ED Note		Buffalo, Guyon A [100318070]	8/24/2018	8/24/2018
Test of rece		Buffalo, Guyon A [100318070]	8/23/2018	8/23/2018
Test of rece		Buffalo, Guyon A [100318070]	7/19/2018	7/19/2018
25%		Buffalo, Guyon A [100318070]	7/19/2018	7/19/2018
Test AD		Buffalo, Guyon A [100318070]	1/23/2018	1/23/2018
Test AD		Buffalo, Guyon A [100318070]	1/19/2018	1/19/2018
		Buffalo, Guyon A [100318070]	10/12/2017	10/12/2017
		Buffalo, Guyon A [100318070]	10/12/2017	10/12/2017
		Buffalo, Guyon A [100318070]	10/12/2017	10/12/2017
		Buffalo, Guyon A [100318070]	10/5/2017	10/5/2017
		Buffalo, Guyon A [100318070]	10/5/2017	10/5/2017
		Buffalo, Guyon A [100318070]	10/4/2017	10/4/2017
		MSSP HH Recert - Buffalo, Guyon A [100318070]	10/2/2017	10/2/2017
Risa Myers.docx	ABN	Scanned Document on 10/2/2017	10/2/2017	
sample.tif	Legal	Buffalo, Guyon A [100318070]	9/11/2017	
Brief Intraoperative Note	Brief Operative Note	Appointment on 12/12/2016 with	6/6/2017	6/6/2017
Test	Consultation Repor	Appointment on 12/12/2016 with	6/1/2017	6/1/2017
	Photo ID	Buffalo, Guyon A [100318070]	4/7/2017	
	Advance Directives	Buffalo, Guyon A [100318070]	3/29/2017	3/29/2017

Recent

- Media Manager
- Place Amb Orders
- Chart Central
- Help Desk Reports
- Change Context...
- Chart Correction Request
- Secure
- Log Out
- Exit
- Customize This Menu

S-tst-4379929, 1062003
1.2.840.113782 1051249
1.2.840.113782 1050738
S-tst-4347360: 1035864
I-tst-202.TIF 1034678

◀ No filters applied

ATTENDING I. 32 1 332 : Hospital Chart Completion 3872 3:39 PM

OnBase

Scanning to Orders from Media Manager



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 erroneously, 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.

