



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.

Media Manager

Filters Clear All Filters Refresh (2:11 PM) Scan New E-Sig Form Camera

Buffalo, Guyon A "Bison" MRN: 100318070

New files will be attached to: Patient: Buffalo, Guyon A "Bison" [100]

Document ID	Internal ID	Description	File Attach
106772	1177247	Office H&P	Appointment
106546	1176526	Office H&P	Appointment
106547	1176533	Not a Note	Document
105984	1175053	Policy 1000.	Patient
105991	1175056		Patient
105998	1175059	Test	Patient
105934	1174978	Medical Power of Attorney	Advance Directives Patient

3

Select Current Patient
Choose an Encounter
Choose an Order
Create New Encounter
Create New Order
Create New Consent

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**.

Order Search

Search Options

From: 8/24/2017 To: Order Type: (all)

☐ Outstanding
 ☐ Preliminary
 ☒ All

Procedure: Procedures [1], General Supply [2], Microbiology [3], Radiation Oncology [4]

Search

Date/Time	Procedure	Authorizing Provider	Status	Order ID	Exp Date
04/30/2018 12:00 AM	CBC (INCLUDES DIFF/PLT) WITH PAT...	PROVIDER, HISTORICAL...	Final result	1072018	09/12/2017
11/2/2017 12:00 AM	CBC WITH PLATELET AND DIFFER...	PROVIDER, HISTORICAL...	Final result	1072017	09/12/2017
09/12/2017 12:00 AM	CBC HEMOGRAM	PROVIDER, HISTORICAL...	Final result	1072018	09/12/2017

Accept **Cancel**

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 freeze while OnBase is open.

Media Manager

Filters Clear All Filters Refresh (1:28) **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 Repc	Appointment on 12/12/2016 with	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
726	759386	Test of receipt	Notice of Privacy Buffalo, Guyon A [100318070]		7/19/2018	7/19/2018

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.

Store image as:

A Scan ID Card Select Document Type [0]

B Scan Single Sided Select Document Type [0]

C Scan Duplex Select Document Type [0]

D Scan Color Select Document Type [0]

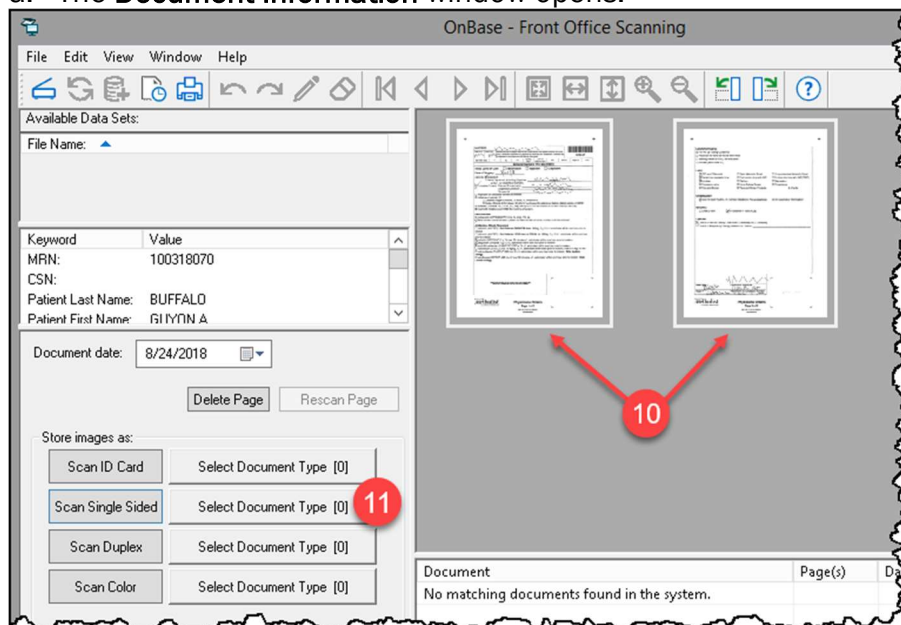
OnBase

Scanning to Orders from Media Manager

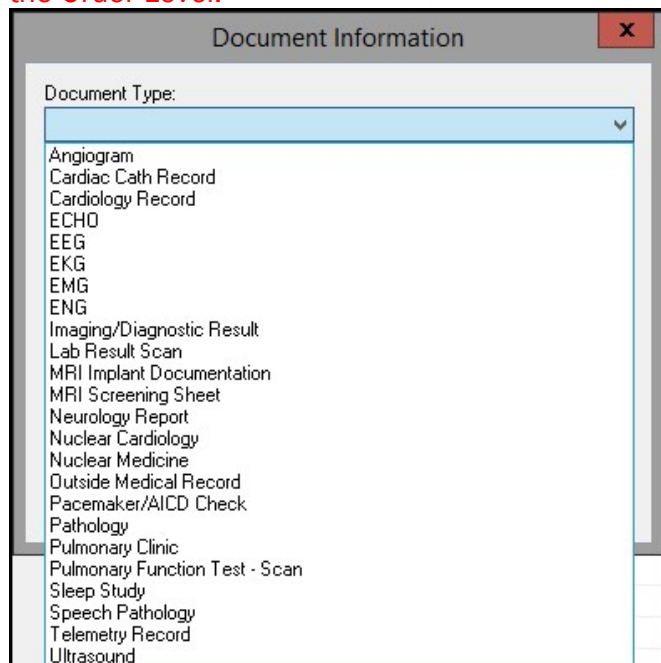


Indexing Scanned Images

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.**



OnBase Scanning to Orders from Media Manager



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**.

Document Information

Document Type: Pathology

Document Description: CBC Path Review 4/30/2018

Service Date: 8/24/2018

Effective Date: 8/24/2018

Received Date: 8/24/2018

OK Cancel

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.

Document date: 8/24/2018

Delete Page Rescan Page

Store images as:

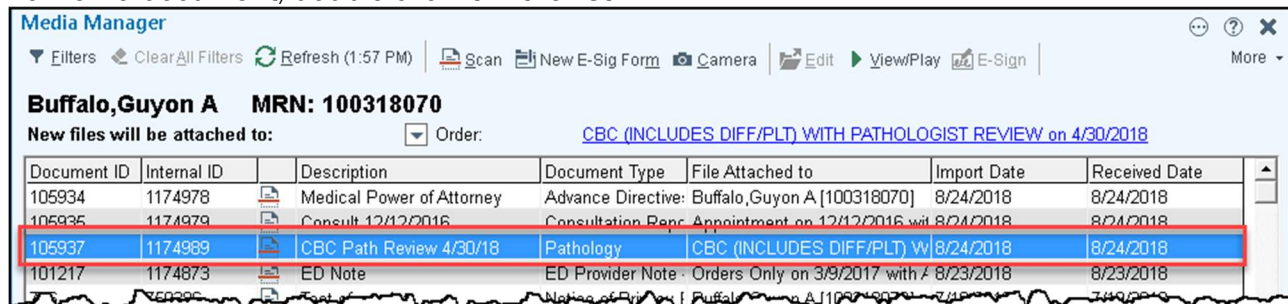
Scan ID Card	Select Document Type [0]
Scan Single Sided	Select Document Type [0]
Scan Duplex	Select Document Type [0]
Scan Color	Select Document Type [0]

Upload Images Discard Images

OnBase 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 Rep: Appointment on 12/12/2016 with		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	

OnBase Scanning to Orders from Media Manager



Troubleshooting

My Epic Screen is Frozen

Is your Epic screen frozen?

A session of OnBase is still open. Click on the OnBase icon and continue scanning or close the OnBase window.

Document ID	Internal ID	Description	Document Type	File Attached to	Import Date	Received Date
105934	1174978	Medical Power of Attorney	Advance Directives	Buffalo, Guyon A [100318070]	8/24/2018	8/24/2018
105935	1174979	Consult 12/12/2016	Consultation Report	Appointment on 12/12/2016 with	8/24/2018	8/24/2018
105937	1174989	CBC Path Review 4/30/18	Pathology	CBC (INCLUDES DIFF/PLT) WIT	8/24/2018	8/24/2018
101217	1174873	ED Note	ED Provider Note	Orders Only on 3/9/2017 with As	8/23/2018	8/23/2018
726	759386	Test of receipt	Notice of Privacy P	Buffalo, Guyon A [100318070]	7/19/2018	7/19/2018
727	948877	Test of receipt	PO - Consent for T	Buffalo, Guyon A [100318070]	7/19/2018	7/19/2018
S1st-4506031	1141823	25%	Financial Policy	Buffalo, Guyon A [100318070]	1/23/2018	1/23/2018
S1st-4501825	1141442	Test AD	Advance Directives	Buffalo, Guyon A [100318070]	1/19/2018	1/19/2018
1.2.840.113782.1065293	1065293	Test PDF - THPO			10/12/2017	10/12/2017
1.2.840.113782.1065292	1065292	Test Image			10/12/2017	10/12/2017
1.2.840.113782.1065295	1065295	Test PDF			10/12/2017	10/12/2017
1.2.840.113782.1063153	1063153	Hung Test 2			10/5/2017	10/5/2017
1.2.840.113782.1063152	1063152	Hung test			10/5/2017	10/5/2017
1.2.840.113782.1063103	1063103				10/4/2017	10/4/2017
1.2.840.113782.1062906	1062906				10/2/2017	10/2/2017
D1st-4384308	1062907	Risa Myers.docx			31/10/2017	
S1st-4379929	1062003	sample.tif			9/11/2017	
1.2.840.113782.1061249	1061249	Brief Intraoperative			6/6/2017	6/6/2017
S1st-4347369	1035864	Test			6/1/2017	6/1/2017
Hst-202.TIF	1034678				4/7/2017	
S1st-4153050	1033305				3/29/2017	3/29/2017
D1st-4384271	1062877	Using Chart Correct			3/9/2017	
Hst-203.TIF	1034679				10/2/2017	
1.2.840.113782.1024127	1024127				3/29/2017	3/29/2017
S1st-2709095	11073467	11/10/16 Black			12/22/2016	

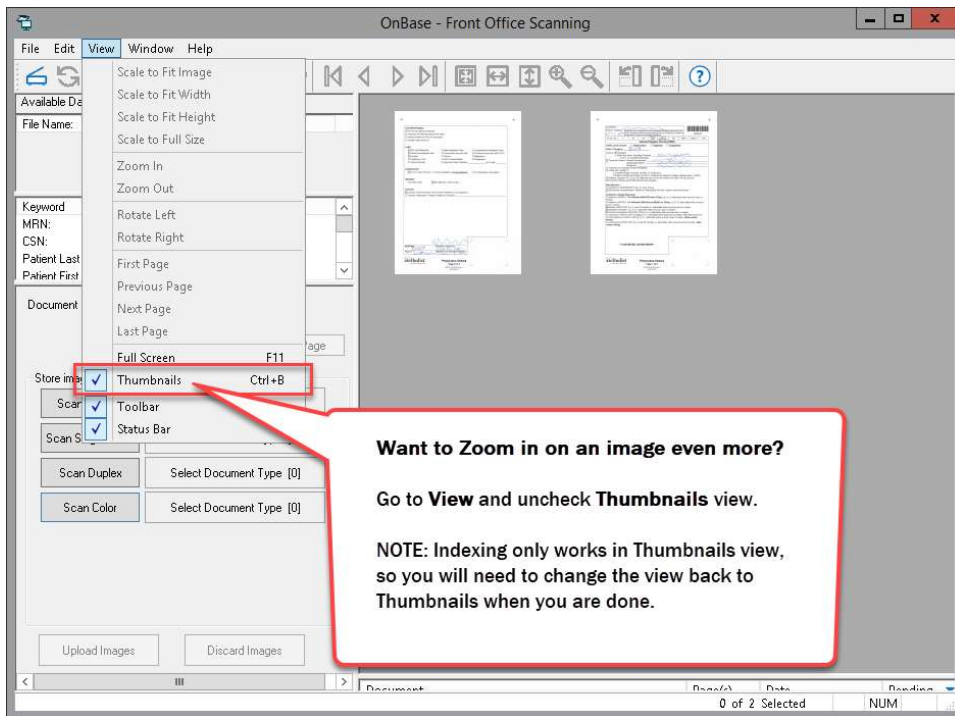
How Do I Zoom in and out on Images?

Want to Zoom in on a thumbnail?

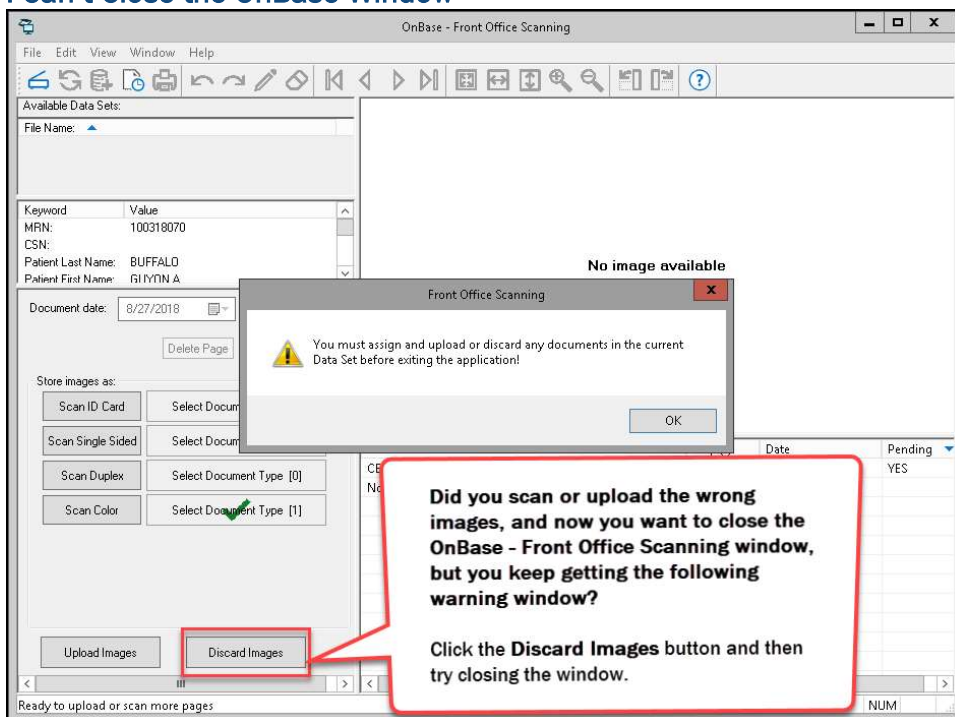
Hover your mouse over the thumbnail.

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

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

Recent: Media Manager, Place Amb Orders, Chart Central, Help Desk Reports, Change Context...

Patient: Buffalo, Guyon A [100318070]

Submit Chart Correction Request

Oops I accidentally scanned an image to the wrong patient, what should I do?

Submit a Chart Correction Request if you upload to the wrong patient.

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
Legal		Buffalo, Guyon A [100318070]	8/27/2018	8/27/2018
Test		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		Buffalo, Guyon A [100318070]	8/24/2018	8/24/2018
ED Note		Buffalo, Guyon A [100318070]	8/23/2018	8/23/2018
Test of rece		Buffalo, Guyon A [100318070]	7/19/2018	7/19/2018
Test of rece		Buffalo, Guyon A [100318070]	7/19/2018	7/19/2018
25%		Buffalo, Guyon A [100318070]	1/23/2018	1/23/2018
Test AD		Buffalo, Guyon A [100318070]	1/19/2018	1/19/2018
Test		Buffalo, Guyon A [100318070]	10/12/2017	10/12/2017
Test PDF		Buffalo, Guyon A [100318070]	10/12/2017	10/12/2017
Hung Test 2		Buffalo, Guyon A [100318070]	10/5/2017	10/5/2017
Hung test		Buffalo, Guyon A [100318070]	10/5/2017	10/5/2017
		Buffalo, Guyon A [100318070]	10/4/2017	10/4/2017
		Buffalo, Guyon A [100318070]	10/2/2017	10/2/2017
Risa Myers.docx	ABN	Scanned Document on 10/2/201	10/2/2017	
sample.tif	Legal	Buffalo, Guyon A [100318070]	9/11/2017	
	Brief Operative Not	Appointment on 12/12/2016 with	6/6/2017	6/6/2017
Brief Intraoperative Note	Consultation Repor	Appointment on 12/12/2016 with	6/1/2017	6/1/2017
Test	Photo ID	Buffalo, Guyon A [100318070]	4/7/2017	
	Advance Directives	Buffalo, Guyon A [100318070]	3/29/2017	3/29/2017

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

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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.

