

## OnBase: Scanning

OnBase Unity client is an application for scanning a wide range of clinical and administrative documents such as results, written orders or notes, clinically relevant photos, and other files within a patient's chart. OnBase interfaces with Epic, allowing end users to view scanned documents in Epic. **Please do not use Media Manager.**

### How it Works

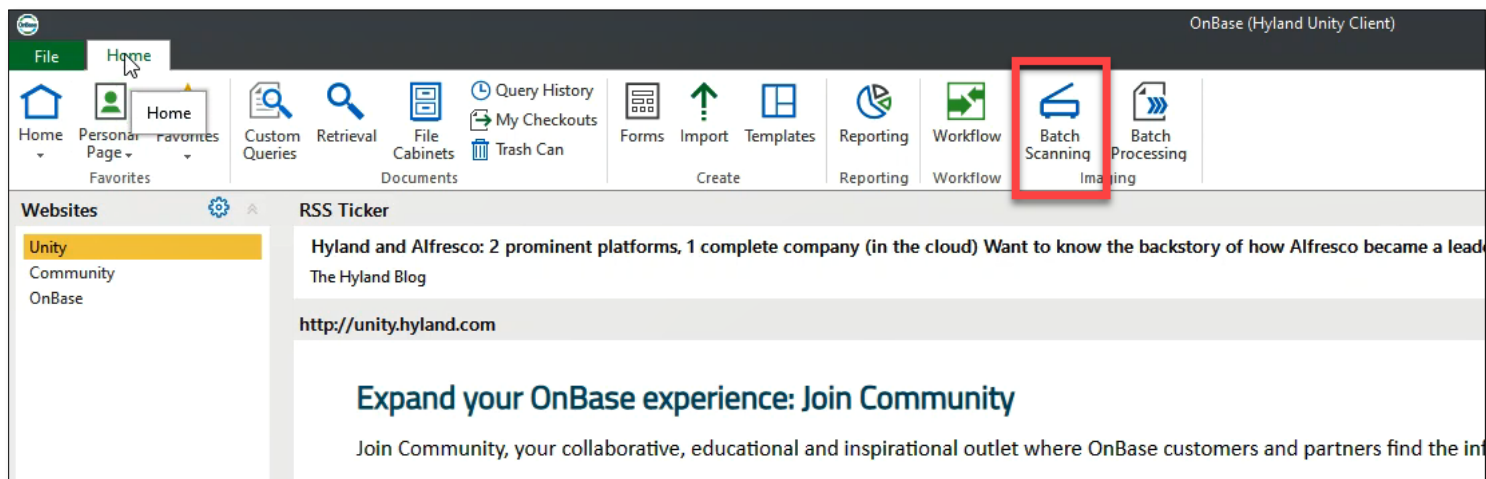


This Tip sheet provides step by step instructions on how to scan documents in OnBase. Follow the steps below to complete the scanning process from the OnBase Unity client.

1. Prep the documents.
2. Ensure that the scanner in ON.

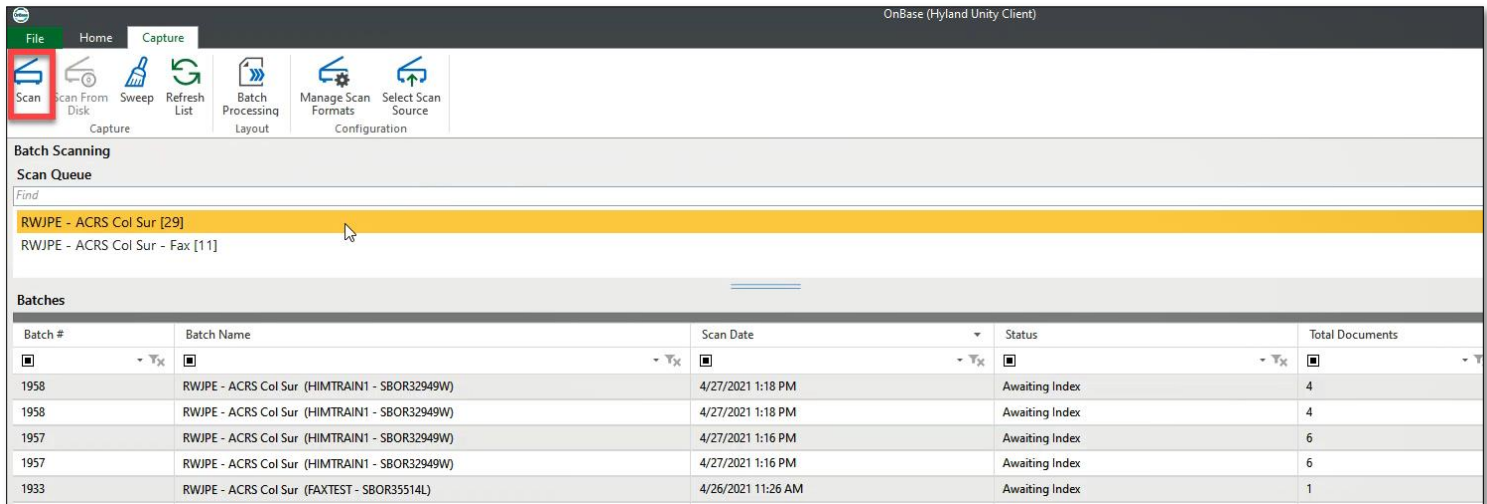


3. Double-click on the **OnBase Unity Client** icon on your desktop.
4. Load the batch onto the scanner (face down and head first on the Fujitsu scanner).
5. From the Home tab, click on the **Batch Scanning icon** in the top ribbon.

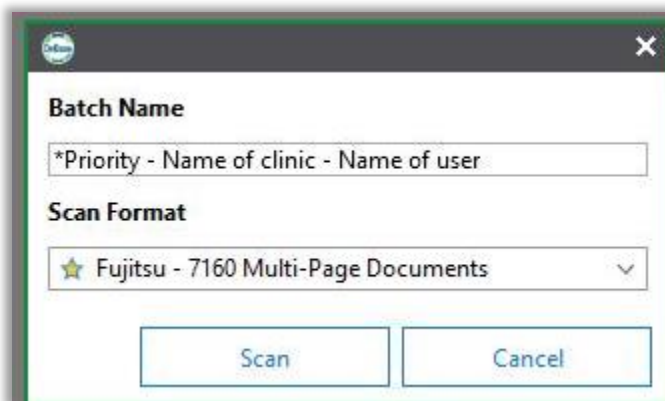


If the button is grayed out. Make sure the Unity Client is licensed correctly using the steps outlined in the Licensing Unity Client section.

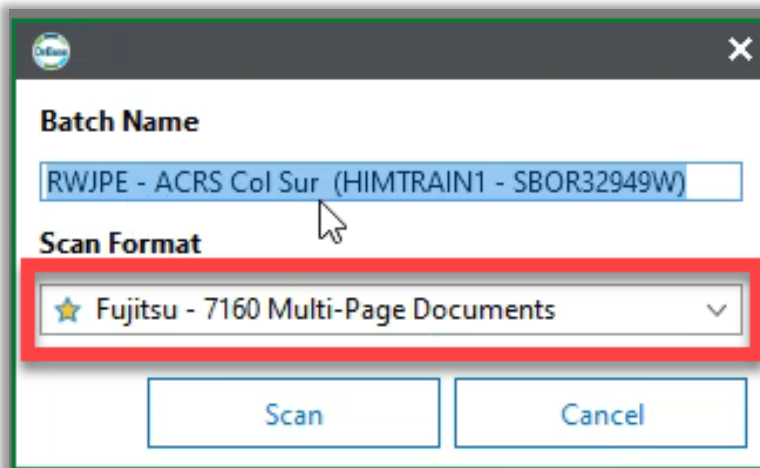
6. Select the **Scan Queue** for your department.
7. Click **Scan** button on the top left ribbon or right click on the queue and select **Scan**.



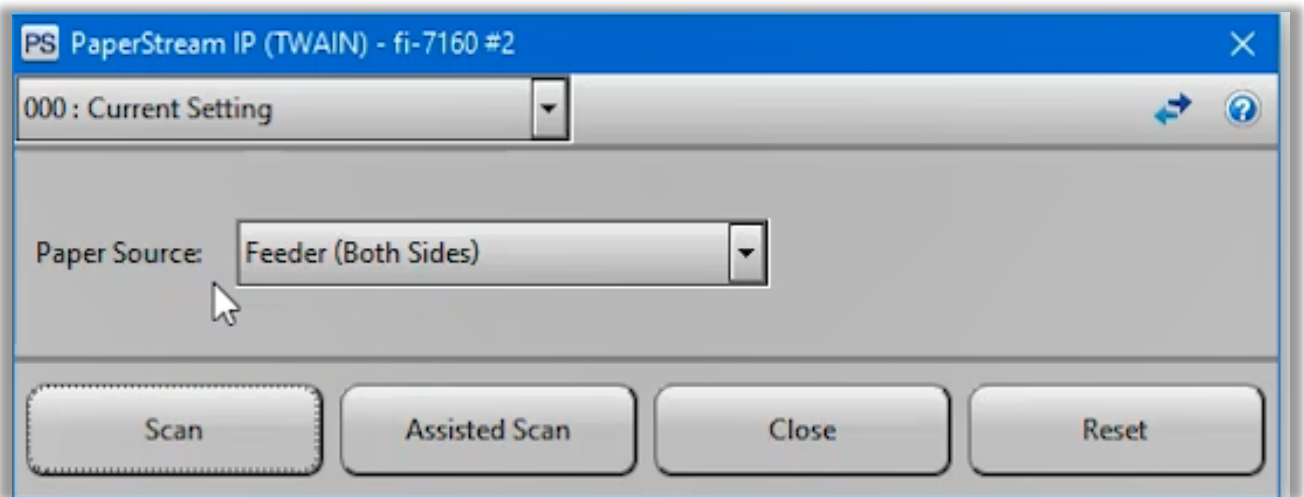
8. To expedite processing of priority batches, enter **\*Priority** under **Batch name (24-hour turnaround)**. Anything scanned under Priority batch will be indexed first (*The turnaround time on the weekends: 48-72 hours from the time the documents are received*).



9. Adjust the **Scan Format** that applies to the batch you are scanning.

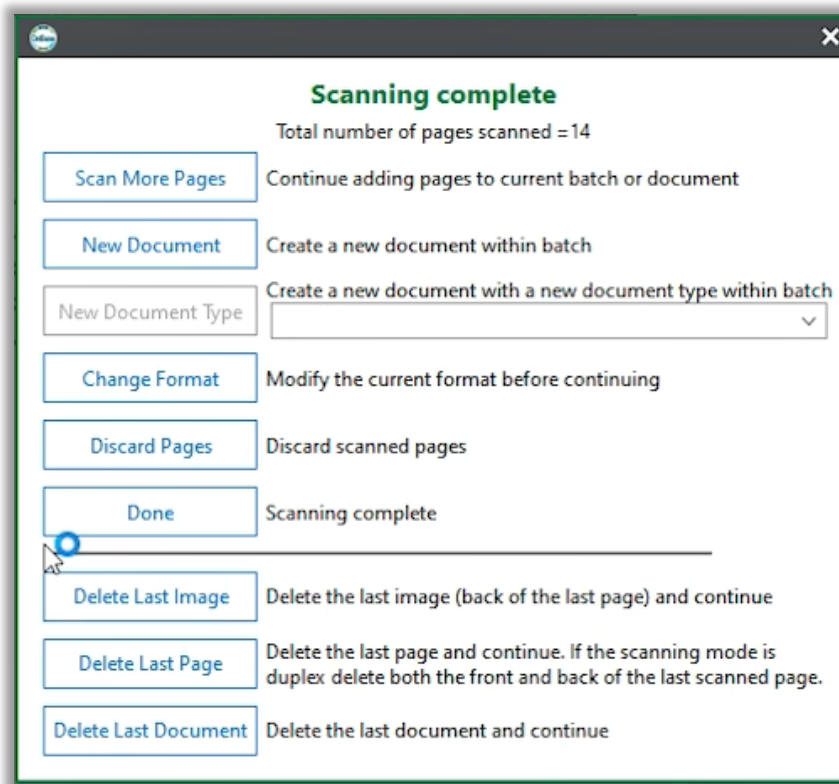


10. Click **Scan**  
 11. Select the **Paper Source** option – Feeder (front side), Feeder (Back side) or Feeder (both sides).



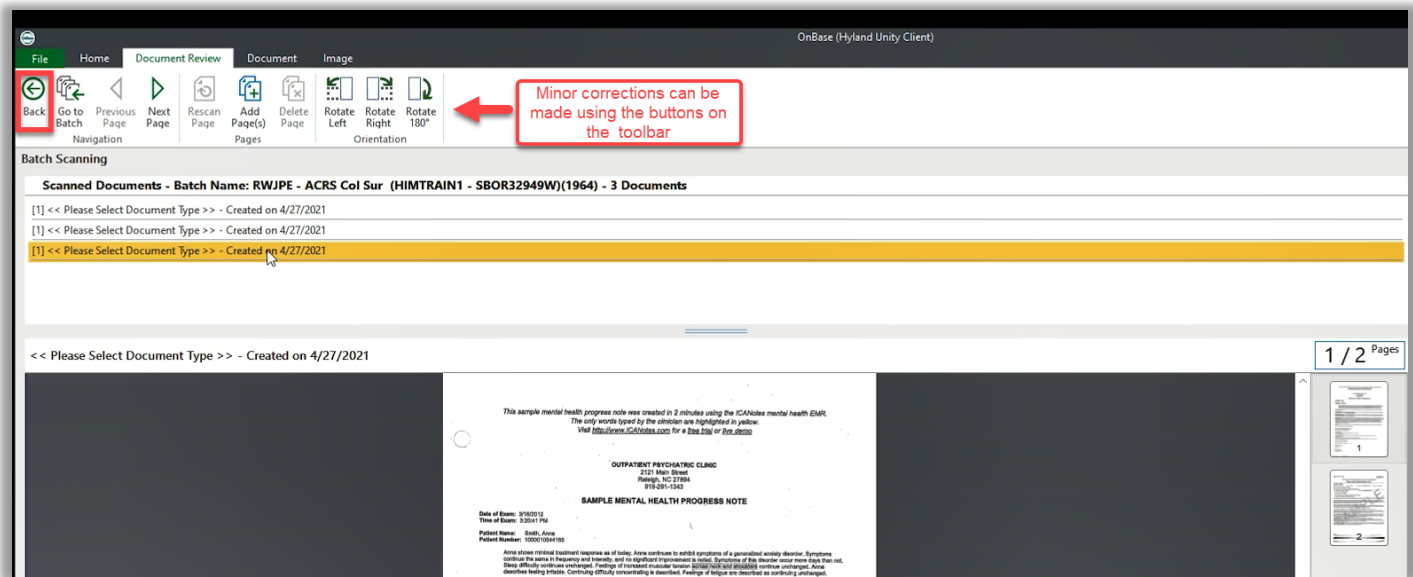
12. Click **Scan**

13. When scanning is complete, a window pops up and gives a few options to add more pages or discard pages. If using a batch coversheet, verify page count on screen matches batch coversheet. If page count does not match, click delete/discard, and rescan batch.



14. Press **DONE** if you are done scanning the batch.

15. Review the documents that are scanned to ensure that all pages are scanned. Minor corrections can be performed via the toolbar.



16. Remove the batch from the feeder.
17. Save the scanned batch in a designated location per your policy.

**\*\*Report any system issues/errors to your first line of support. To help expedite the resolution of your issue it is suggested that if an error occurs a screen print is obtained.**

Version #	Purpose of Change	Author	Date of Change
1.0	Initial Creation	Rebekah Jones	4/5/23
1.1	Updated Turnaround Time	Rebekah Jones	11/7/23