

<b>Attachments Module- where does this belong?</b> 	<b>Section</b>	<b>Tab</b>
Referral from outside dentists	Letters	Referral Letter
Letters to patient (missed appts., dismissals)	Letters	To Patient (scanned)
Hospital/ Operating Room Case Reports	Patient Notes	Hospital OR Cases
Prescriptions given to patients	Letters	To Patient (scanned)
Oral Pathology consults from outside	Forms	Pathol/Biopsy Report
Paper Medical Histories	Forms	Medical History
Medical Consult letter from Physician	Medical Info Consults	Medical Consults
<i>Open the Medical Information request from listed- go to Physician's Response</i>		
<i>Check Yes and double click on the numbered lines to scan letter</i>		
Xrays	Images	Radiographs
Clinical Photos	Images	Photos

**To Add a Patient Attachment**, select the Create New Record button  
**Scan Direct** allows only one page documents, multi-page docs  
must be scanned into a file, saved, then attached using the  
Attachment Browse button



See following pages for detailed instructions for each Section of the Attachments module

## Attachments Module



What to add in each Section

To Add a Patient Attachment, select the Create New Record button



Scan Direct allows only one page documents, multi-page docs must be scanned into a file, saved, then attached using the Attachment Browse button



Release of patient information consent on file

Date	Consent Code	Description	File Type
------	--------------	-------------	-----------

**Business Office -Treatment Estimates** saved here when printed & signed by patient

Other tabs- allow addition of scanned documents by hitting the Create new record button

Release of patient information consent on file

Date	Consent Code	Description	File Type
02/21/2018	GENCN2	NEW PT CONSENT-NPPSCRE...	pdf
07/03/2017		Treatment Plan Contract	pdf

**Consents/Trmt Plans**-Hit Create new Record button to Add Patient Consent- select tab for Spanish or Vietnamese consents



Opens a list of consents

**Scanned consents** tab allows addition of a scanned document

EPR (2) Endo Medical History Perio Pathol/Biopsy Report Pedo (1) OMS Consents Anesthesia Records Tmt Plan (Pr)

Date	Description	File Type	Status	User	Approved By	Approval Date
------	-------------	-----------	--------	------	-------------	---------------

**Forms**- EPR (extended patient record)- has Forms on file for the patient from the Forms tab

Other tabs- allow addition of scanned documents by hitting the Create new record button

Section	Outside Records					
Business Office (4)	Date	Description	File Type	Status	User	Approv...
Consents/Tmt Plans (15)						
Forms (4)						
Historical Records						

**Historical Records** - records sent by an outside clinic/dentist

Section	Radiographs	Photos
Business Office (4)	Date	Description
Consents/Tmt Plans (15)		
Forms (4)		
Historical Records		
HOP Clinic		
Images		

**Images**- scan radiographs or photos sent by outside dentist/clinic

Section	Ins Card Copy	Info requests	EOB	Claims
Business Office (4)	Date	Description	File Type	
Consents/Tmt Plans (15)				
Forms (4)				
Historical Records				
HOP Clinic				
Images				
Immunizations				
Insurance				

**Insurance**- scan copy of Insurance Card, Info requests from Ins. Co. Explanation of Benefits, Claims



Section	Medical Consults (1)				
Business Office (4)	Form #	Date	Description	Status	User
Consents/Tmt Plans (15)	2810009	07/25/2016	Medical Information Request	OPEN	Hansel,
Forms (4)					
Historical Records					
HOP Clinic					
Images					
Immunizations					
Insurance					
IPE Clinic					
Letters (1)					
Medicaid Forms					
Medical InfoConsults (1)					

**Medical Info Consults-** opens the Medical Information Request forms on file for the patient  
 Medical consult letters from physician are scanned into **Physician's Response** tab of Medical Consult form  
 Select & double click to open the MIR form listed- go to Physician's Response tab to scan in form  
 Check Yes when scanning Medical Consult or Labs  
 If there is no MIR form- add a new one by hitting the Create New Record button and selecting the MCR form

Section	Contact Notes	Hospital/OR Cases					
Business Office (4)	Date	Description	File Type	Status	User	Approv...	Approval ...
Consents/Tmt Plans (15)							
Forms (4)							
Historical Records							
HOP Clinic							
Images							
Immunizations							
Insurance							
IPE Clinic							
Letters (1)							
Medicaid Forms							
Medical InfoConsults (1)							
MTM							
NOMC Referral Form							
Patient Notes							

**Patient Notes-** Contact Notes that are too long for the Contact Notes in the Patient Card can be scanned here  
**Hospital/OR Cases-** Hospital notes from Operating Room cases