ChartMaker® Clinical Quick Reference Card for Scanning

SCANNING

Scanning Documents with PaperPort

➢ Double click the **PaperPort** Icon
➢ Select **Clinical** from the Scan or Get Photo section on the left.
➢ Place your documents into the scanner (The papers should be face down and top down)
➢ Click **Scan.**
➢ In the TWAIN Driver (32) window, select the **Scan Type** as needed. **ADF** (front side) for single sided or **ADF** (Duplex) for double sided documents.
➢ Click **Scan**.
➢ The documents you have placed in the scanner will now be scanned into the computer and be available for filing in ChartMaker Clinical.

Rotating Scans in PaperPort

➢ Select the scanned image to be rotated by clicking once on the image preview PaperPort.
➢ Click the **Item** tab.
➢ Click the **Rotate** icon in the appropriate designated direction.

Delete a Scan in PaperPort

➢ Right click the preview of the scanned image to be deleted in PaperPort.
➢ Select **Delete**.
➢ Click **Yes** to delete.

Transfer Scans from a Remote Location

➢ Right-click the **Scan Utility** icon in the system tray, and then click **Move Files**.
➢ After your files have been transferred successfully you will see the Info dialog. Click the **OK** button.

Access Scan Management

➢ The Scan Management screen can be accessed by clicking **Chart > Scan Documents.**
➢ If you have a patient's chart open via the Notes tab menu by clicking **Notes > Scan Documents**. If the page was accessed via a Notes tab menu the patient will be selected in the Scan Management dialog.

Insert a Scan into a Patient Chart

➢ Click **Chart > Scan Documents**.
➢ Highlight the **Scanned Item**. If you do not see the scanned item, change the scan location from Local Files to **Unassigned Files** in the upper left.
➢ Select the **Patient** whose chart you want to insert the scanned item into.
➢ Select a **User** to send the Scanned Note to, if needed.
➢ Select or enter a **Heading** for the scan.
➢ Select the **Practice**, if needed.
➢ Check the **Stack scans into one Note** option, if applicable.
➢ Modify the **Date**, as needed.
➢ Select the **Case**, as needed.
➢ Select the **Folder** for the scanned item, if applicable.
➢ Click the **Save** button.

Reassign a Scan

➢ Open the patient's chart who has the scan incorrectly filed.
➢ Click the **Organizer** button in the toolbar.
➢ Right-click the **Scan** you want to move, and then click **Reassign Scan(s)**.
➢ Select the **Patient** you want to reassign the scan to, and then click the **OK** button.
➢ In the warning dialog, click the **Yes** button.

Unassign a Scan

➢ Open the patient's chart who has the scan incorrectly filed.
➢ Click the **Organizer** button in the toolbar.
➢ Right-click the applicable **Scan**, and then select **Unassign Scan(s)**.
➢ In the warning dialog, click the **Yes** button.
➢ The scanned file is now moved to the Unassigned Files folder. A user can now assign this scan to another patient by accessing the Unassigned Files in the Scan Management dialog.