Records Manager Reference Guide

Records Manager

After logging in to the **Records Manager** module, you will see the Records Manager Home Page, shown below. This page contains two headers, **Tasks** and **Communications**. In this section, we will focus on the Tasks portion of the page. Messages are covered in the Docpad Reference Guide. Radekal Support links to the main support page for Radekal clients.

The **Records Manager** allows the user to associate a variety of documents to a patient's file. This is particularly useful when test results are returned or you have scanned the patient's records and want to make the documents available to the physician.

The **Tasks** section includes these features for dealing with scanned documents, managing notes, and filing test results. The tasks are shown in red when there are items to be managed.

- **Create Documents**: Allows the user to transfer documents to specific patient charts.
- **Past Notes**: Allows the user to see different types of notes associated with a particular patient.
- **Attach Documents**: Allows user to attach documents to a patient's chart
- **Rejected Documents**: Shows documents the physician has rejected as not associated with that patient.
- **Unlinked Test Results:** Displays a list of results that need to be associated with a patient and sent to their file.

Like most of *Radekal,* there are several buttons on the top right banner:

1. **Upload Manager**: Facilitates uploading documents into Radekal.
2. **Home**: Takes the user back to the home section of Records Manager.
3. **Messages**: Lets the user send and receive messages within the clinic.
4. **Logout (the lock)**: Logs the user out of Records Manager and back to the password login section.

Each of these functions will now be described in detail.

Upload Manager

Upload Manager looks much like any other upload application. You select the appropriate directory and file, then it gets uploaded. You can then move the file into a patient's chart.

Here are the steps to upload a file from your local computer to the server:

1. Click on Upload Manager link. Pop-up will open.

2. Select the Directory where you want to upload the document from the Directory Tree on the left of the pop-up.

3. Click on Upload button(Blue Up Arrow icon in the heading just left of the bright yellow Archive icon) on the right of the pop-up. Another pop-up will open to allow you to browse your local computer files.
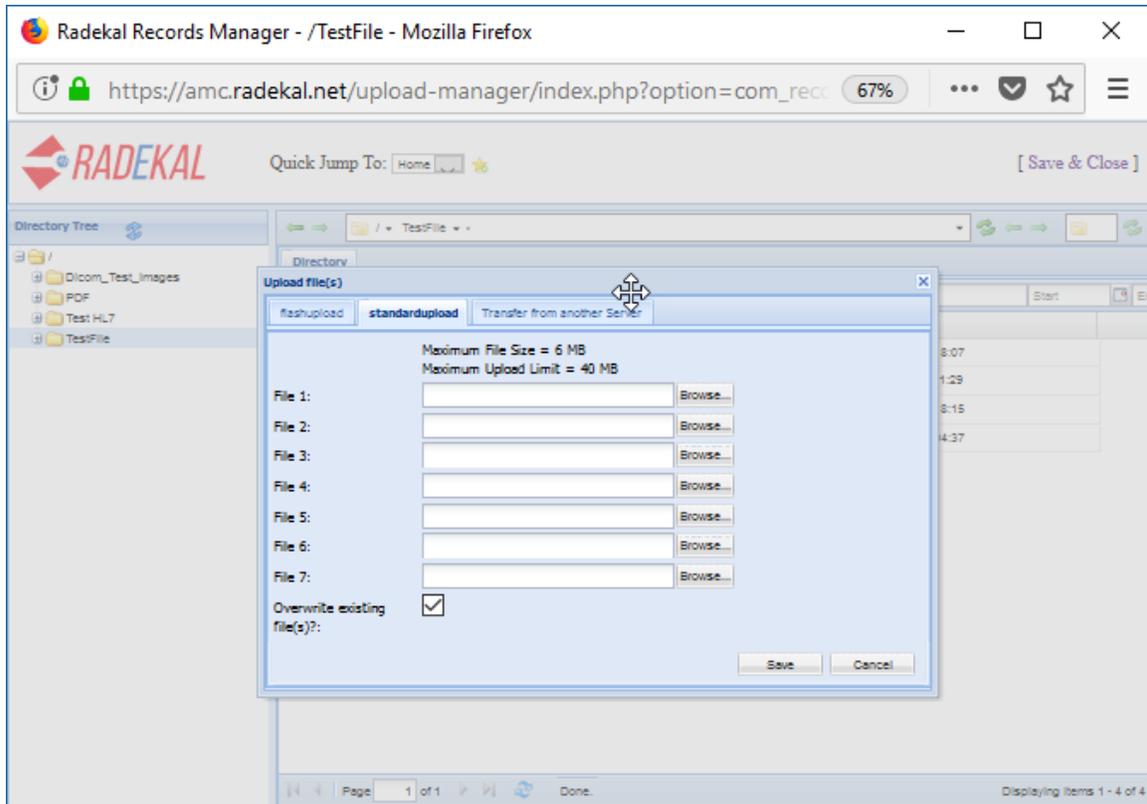
4. Click on Browse button. It will take you to your computer file directory where you can select any file to upload.
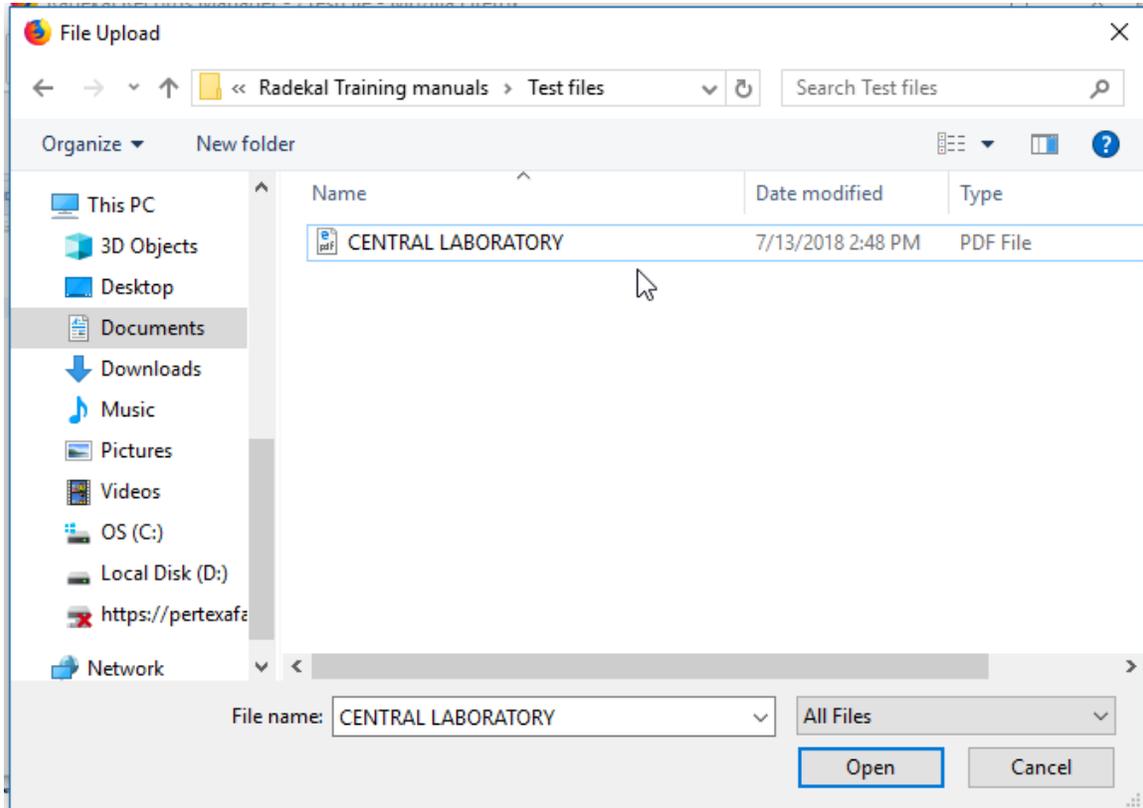
5. Click on other Browse buttons to add more files if desired.
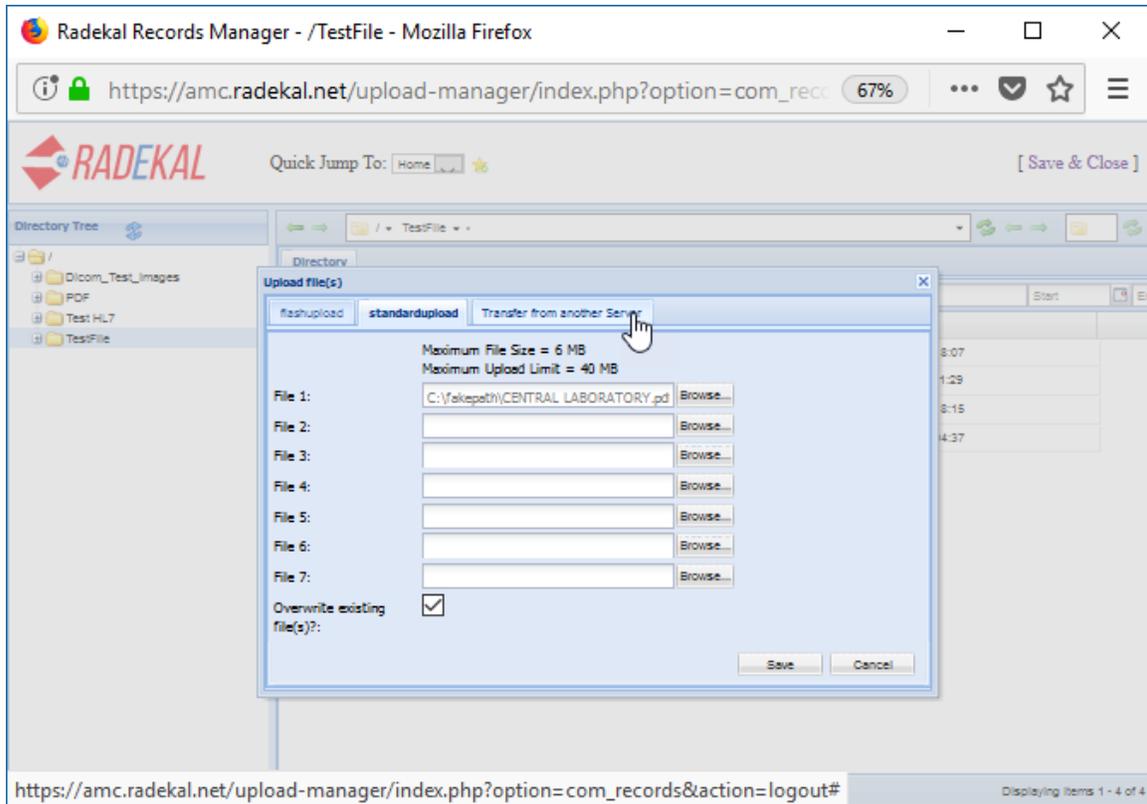
6. Click on Save button.

7. Click on Save and Close link on top right corner. You can now see the uploaded file in the chosen directory.
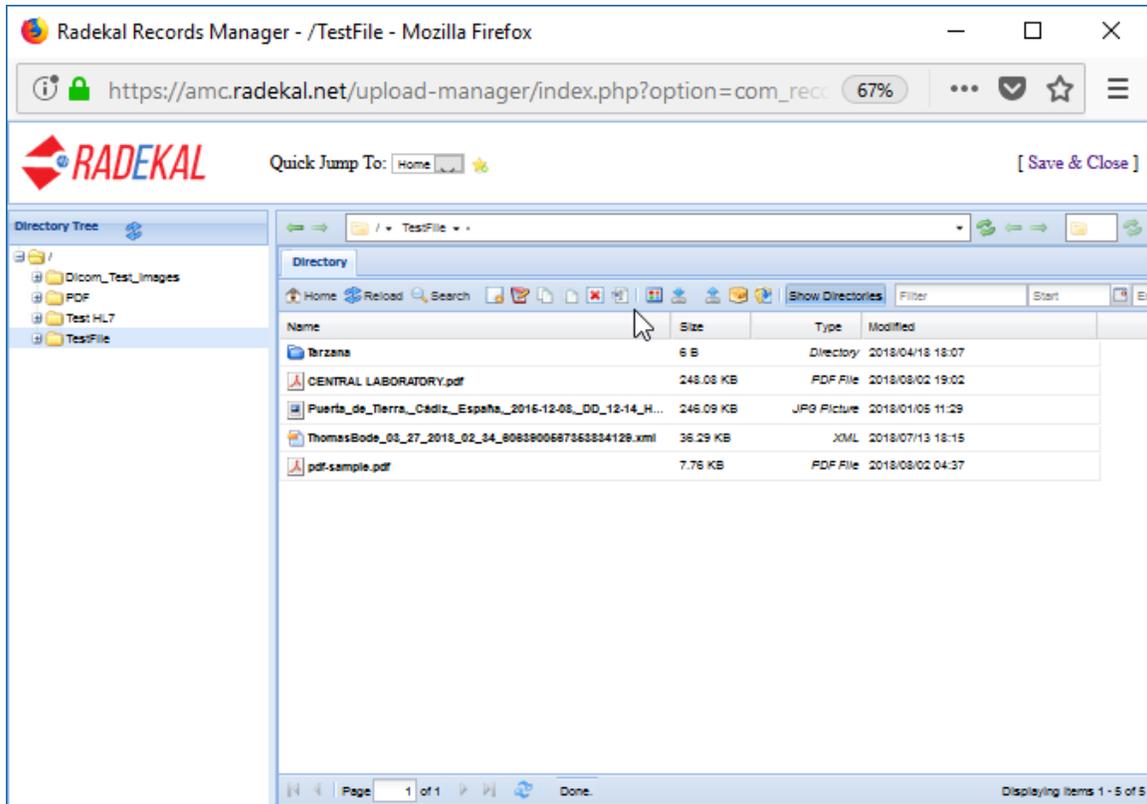
8. Now go to Create Document.
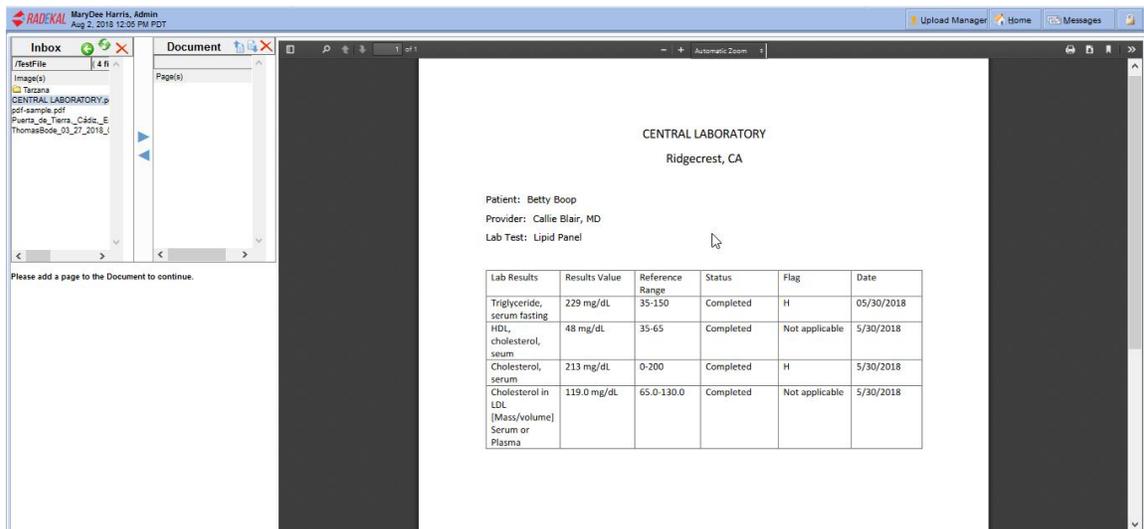
9. Here you will see the uploaded files in the selected folder. From here proceed with the Create Documents process as described in the next section.

Create Documents

Clicking on **Create Documents** brings up this screen. This section is divided into 3 sections: **Inbox, Document,** and the **Image screen**. When you first start, the Image screen may be blank. The illustration below shows a Continuity of Care Record for a patient.

Inbox and Document: These two sections are used to transfer files from the users desktop to the *Radekal* system. The user can have multiple directories in the **Inbox**. Files can be transferred to the **Document** section so they can be placed in a selected **Document Type** for a patient.

The blue arrows between the **Input** and **Document** boxes allow you to select a file for handling. For example, when you hit the right-pointing arrow, the file name selected in the Inbox will be shown in the Document box and its image will appear in the Image box to the right (not shown here). After a file has been handled, the name can be removed by clicking the left-pointing arrow to move it back to the Inbox.
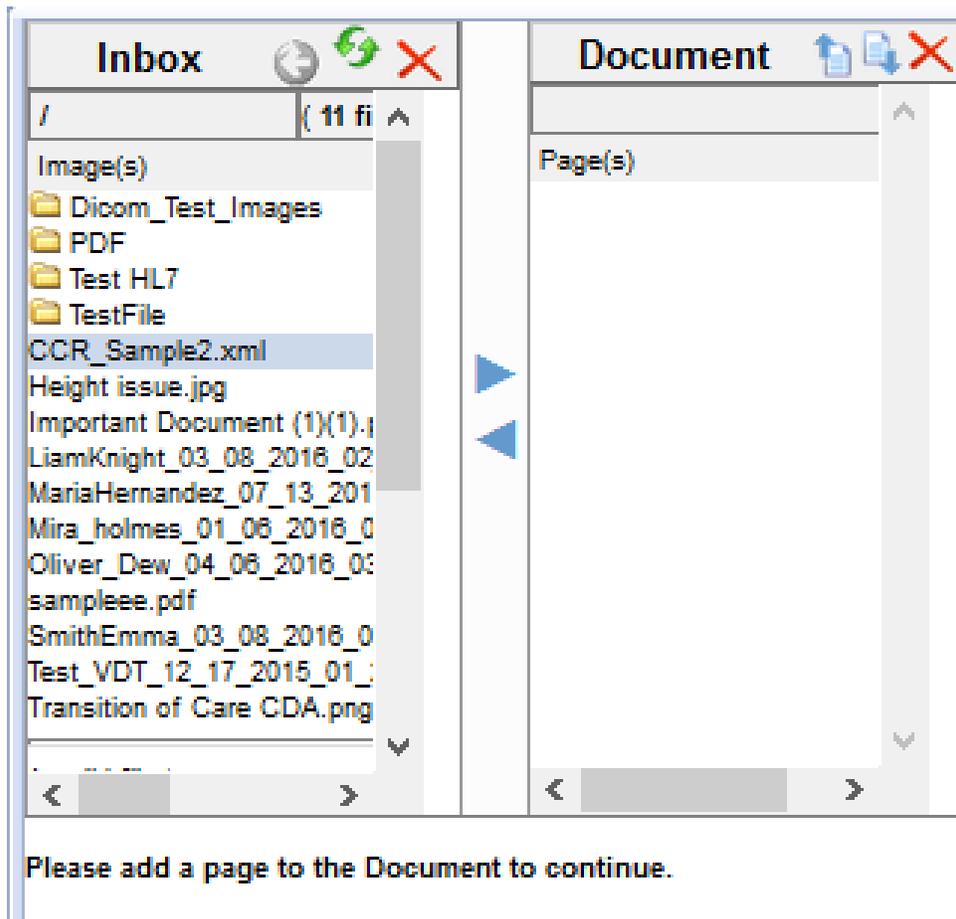
The **Document Type** is a pop up with a variety of selections. The user clicks one of the selections to associate the document to that type.

Document Type

Test Result

Note Types:
Progress Note
Complete H&P Note
Consult Note
Consultant Note
Hospital/discharge Summary
Surgical Report
Patient Entered HPI
Chronic Care
Other

Correspondence Types:
Administrative Document
Correspondence
Insurance Form
ABN
Medication List
General Practice Consent Form
Referral
Pre-authorization Form
Immunization Consent Form

Advanced Directives

Document From Patient

Miscellaneous

Once the user selects a Document Type, more blank fields begin to populate, depending on the type selected. These fields route the document to the proper location in the Radekal system.   Here's an example of a Test Result document to be associated with the patient's chart.
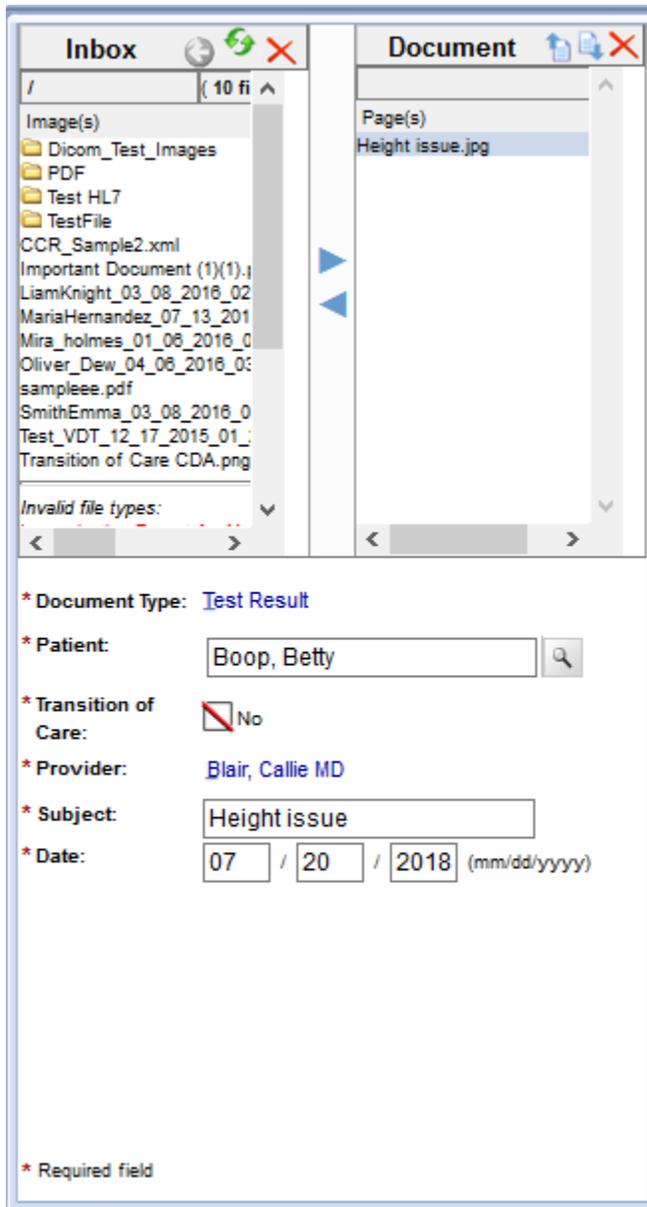
To link this test result with a patient, select the patient by typing in the name and clicking the Search (magnifying glass) icon. That brings up a patient search window with a list of patients for the name given (in this case only one). Select the one you want and click on the box to the left of the name.
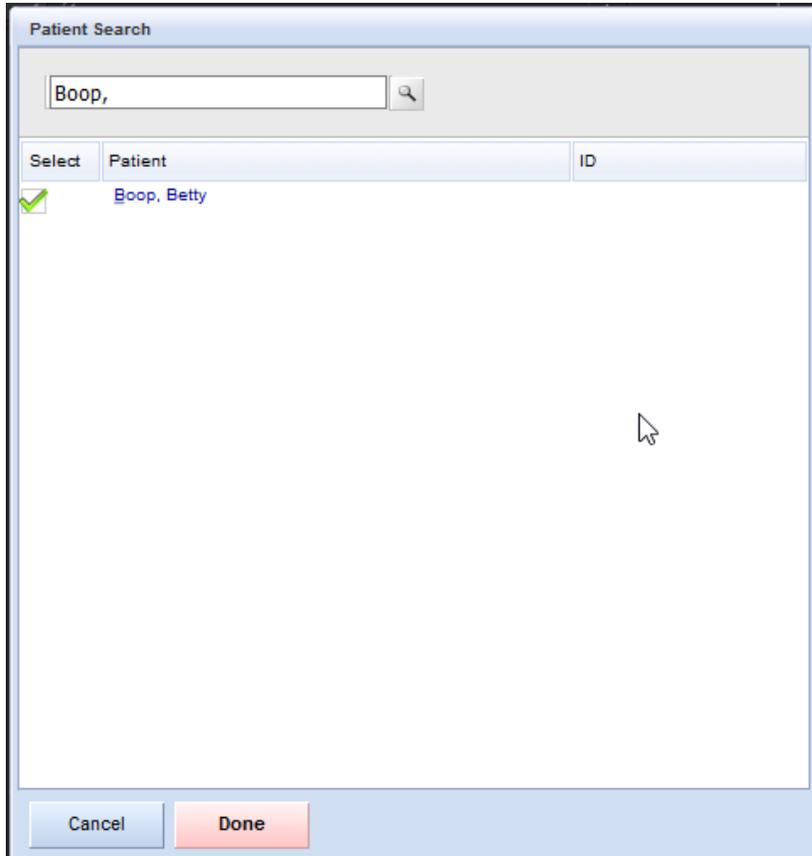
When you click Done, there will be additional fields listed under the Inbox/Document boxes.

Now select the test ordered for this patient to make the link, add any appropriate comments, and click the **Send to Physician** button to create the link.

The **Image** section of the Create Document page shows the scanned document. The upper right corner has controls for how to see the document.

1. Full Screen Window: expands the window to fill the users screen area.
2. Rotate: turns the document clockwise 90 degrees every click
3. Fit in Window: If the file is big, it reduces the proportion to fill in the designated viewing area.
4. Zoom to Full Size: shows the document in its full size.
5. Zoom In: expand document
6. Zoom Out: decrease document
7. Arrows: can move the document up, down, left, and right.

Past Notes

Past Notes is set up to let the user see existing patient notes. These notes are specific to the patient being viewed. First you enter the patient's name using Search, which gives you a list of past notes for that person.

When you select a particular past note, it will be displayed and can be printed or downloaded or faxed.

RADEKAL

Jones, Randy   DOB: 03-31-1956

Reviewed Note

Progress Note
Crofton Medical
AMC Avenue
Ridgecrest, CA 93555
02-01-2018

Patient Name: Randy Jones   **Examining Provider:** US Support, Admin
Patient ID: 16
Patient Birthdate: 03-30-1956
Patient Age: 61 years

Chief Complaints (Annotate)

Back pain

History of Present Illness (Annotate)

Mr. Randy Jones is a 61 year old male patient here today complaining of back pain. He has chronic back pain. The problem is constant. The patient reports numbness. The back pain is located between the shoulder blades. The problem is located on the middle back over spine. It radiates to the left outer hip region and to the right outer hip region. He reports numbness or dysesthesia in the left fingers and the right fingers. The back pain had no obvious cause. Mr. Jones reports sharp pain. The problem is severe. It is improved by NSAIDs.

Page Up	▲	▼	Page Down

Print   Fax   Done

Attach Documents

Attach Documents gives the user another way to add documents to a patient's chart. Once again you choose a patient to begin, using the search button and selecting the appropriate patient.
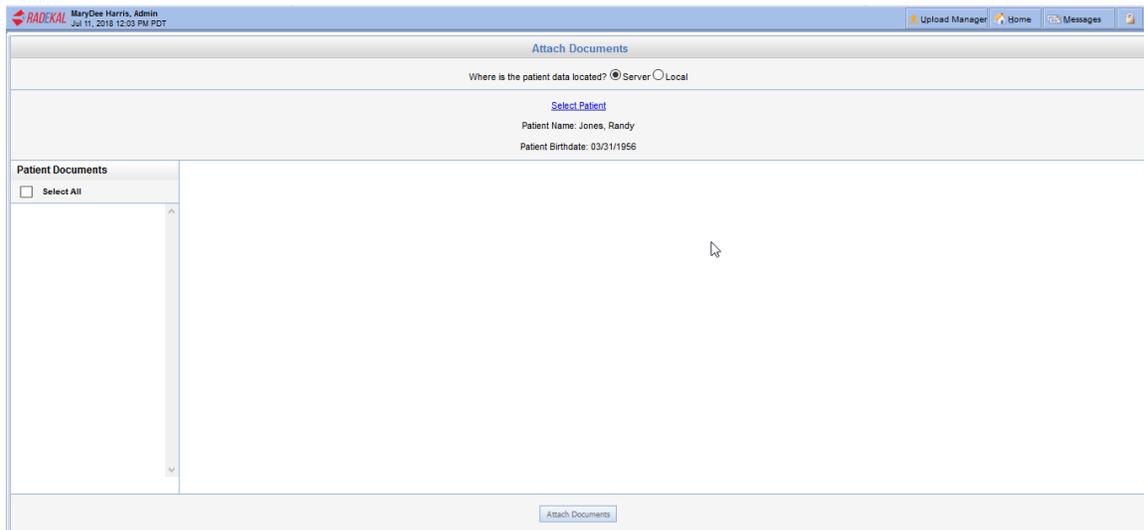
Notice the choice at the top: Server or Local. You choose where the document is located that you want to be attached. When you choose Local, you can upload a document from the computer you're using.

Select Patient works just like it does in Create Document: use Search to find the name, then click the magnifying glass, then click the box in front of the name, and click Done.
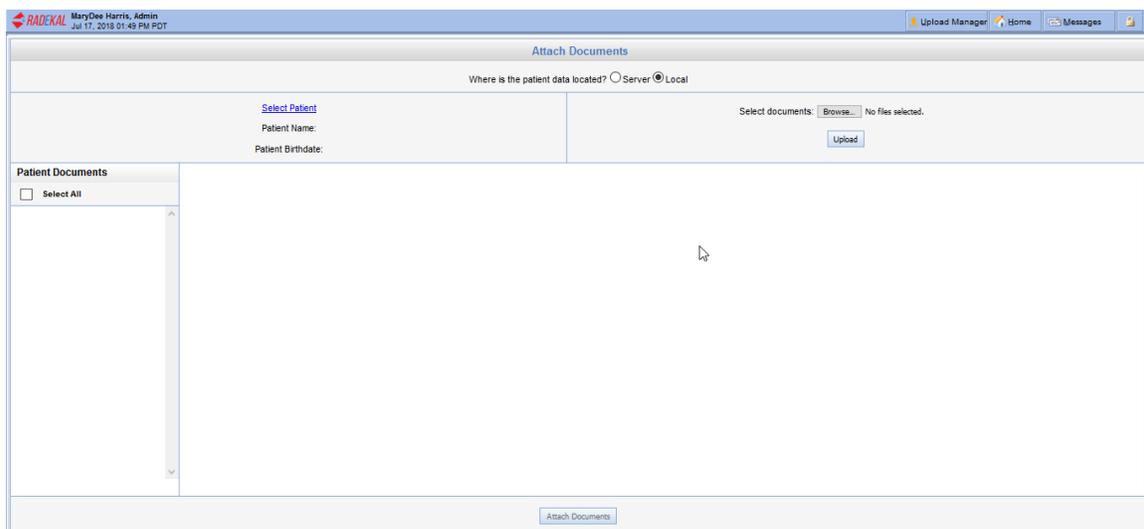
Select the document you want to attach to the patient's file and click Attach Documents at the bottom of the page. No message will appear, but the document will be attached.

When you go to Docpad, you can find the document from the Face Sheet as follows:

- Select the patient and go to the Face Sheet
- Click the View button next to Past Notes
- Select the Documents tab to see the document you just attached to the chart.

Rejected Documents

Rejected Documents (n) lists the test results or other documents that have been rejected by the provider for one reason or another. Mostly commonly a test result has been linked to the wrong patient and much be corrected. The item can be deleted from this page or selected for more options. (The 'n' in parentheses indicates the number of Rejected Documents.) This option only shows up if n is not equal to zero.

Selecting an item from the list returns the user to the Create Document page with an option to Delete the document entirely or to correct it by choosing the appropriate patient and then sending it back to the physician.

Unhandled Test Results

Unhandled Test Results (n) is set up to link test results with a particular patient. The patient's results are listed on the left section of *Radekal*. The user can search for a patient to send the test result to that patient's chart. (The 'n' in parentheses indicates the number of Unhandled Test Results.) This option only shows up if n is not zero.

The Unhandled Test Results page will display a list of all patients with unlinked test results. You can also search for a patient by last name. Click on a patient name to proceed.

Selecting a patient and test result brings up a page with two sections. The left section contains two tabs: **Information Received** and **View Test Result.** The right section is **Select Patient**. The first tab, Information Received, shows the identifying information about the test and the patient.

View Test Result displays the test result for review. Click Done to return to previous page to continue.

To connect this test result with the proper patient, use the Patient Search box to find the Patient and click on Search button.
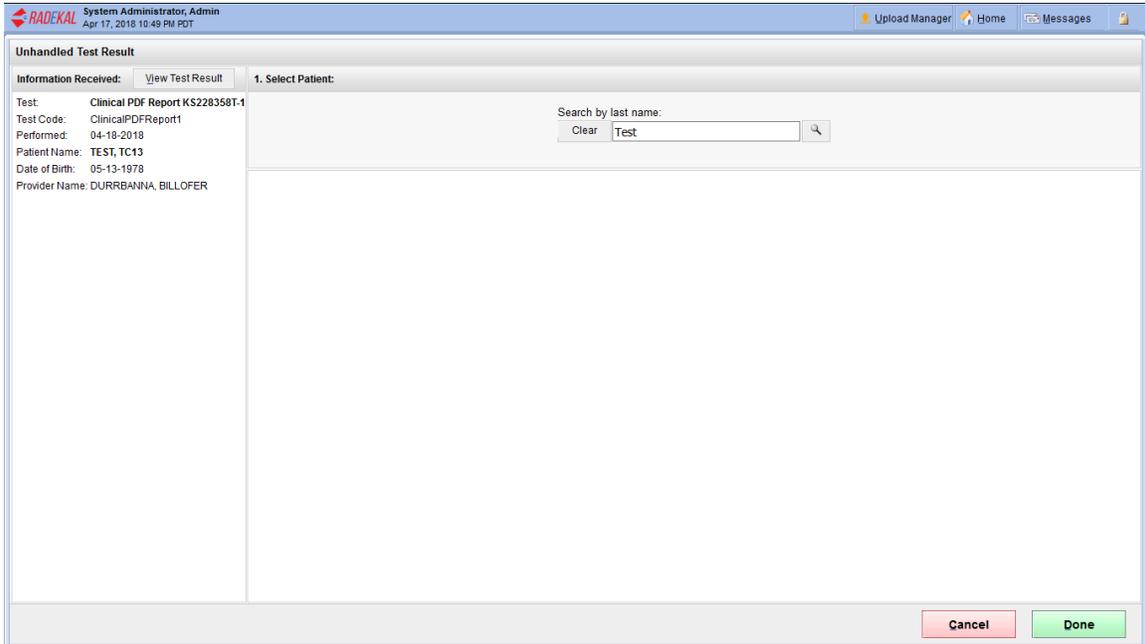
Then select the patient by checking the box to the left of the patient name, then click Done.
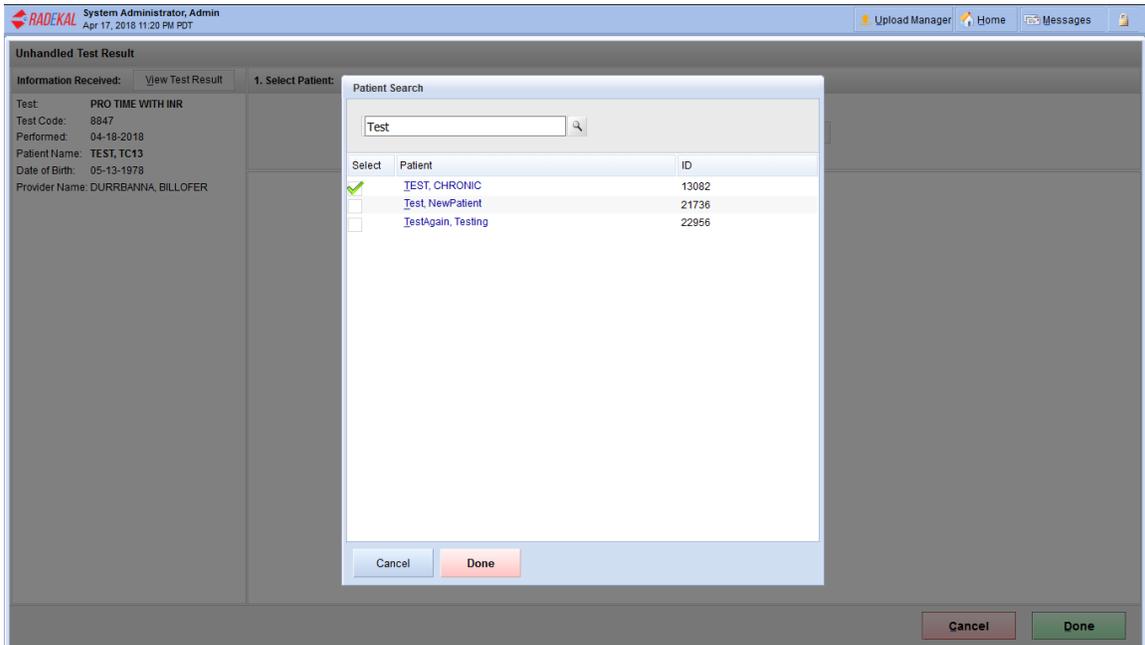
The test result will now be attached to the proper patient.