

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.

SADEKAL MaryDee Harris, Admin Jun 28, 2018 10:29 AM PDT		📒 Upload Manager 🦨 Home 💿 Messages 🔒
Tasks Create Documents Past Notes Attach Documents Rejected Documents (3) Unlinked Test Results (20)	Records Home CalHipso • Radekal Support • Messages	

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.

Tasks Create Documents • Create Documents • Radekal Records Manager - / TestFile - Mozilla Firefox × • Past Notes • Attach Documents • Inteps://amcradekal.net/upload-manager/index.php?option=com_rec Total • Attach Documents • Rejected Documents (3) • Inteps://amcradekal.net/upload-manager/index.php?option=com_rec Total Isov & Close]	Taska • Create Documents • Past Notes • Attach Documents • Rejected Documents	Tasks • Create Documents • Past Notes • Atlach Documents • Atlach Documents • Rejected Documents (3) • Rejected Documents (3)	SRADEKAL MaryDee Harris, Admin Aug 2, 2018 11:47 AM PDT			<u>1</u> U	Ipload Manage	er 🕎 Home	🐨 Messages	
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2. Select the Directory where you want to upload the document from the Directory Tree on the left of the pop-up.



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	Test HL7	258 B	Directory 2	2018/07/09 10:10		
	🛅 TestFile	203 B	Directory 2	2018/08/02 19:02		
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	immunization-Report for-Test-Test_24-Apr-2018_22-23-26.hl7	1.34 KB	File 3	2018/04/25 09:26		
	Important Document (1)(1).pdf	30.52 KB	PDF File 3	2018/08/01 16:26		
	LiamKnight_03_08_2018_02_32_3606982640181992320.xml	80.02 KB	XML 3	2016/04/07 09:34		
	MariaHernandez_07_13_2016_04_66_6484613789287873216	31.7 KB	XML 3	2018/08/01 16:26		
	Mira_holmes_01_08_2018_08_30_848201889809129988.xml	93.85 KB	XML 3	2016/01/25 18:28		
	Cliver_Dew_04_08_2018_03_10_7032888492731188766.xml	18.27 KB	XML 3	2018/04/25 05:28		
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	[4 4 Page 1 of 1 ▷ ▷] 😂 Done.				Displaying items	1 - 22 of 22

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.



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4. Click on Browse button. It will take you to your computer file directory where you can select any file to upload.



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🕂 Downloads						
👌 Music						
Pictures						
📑 Videos						
🟪 OS (C:)						
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🗙 https://pertexafa						
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File na	me: CENTRAL LABORATORY		~	All Files Open	Canc	el .:

5. Click on other Browse buttons to add more files if desired.



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al a f	Directory Upload file(s) fileshupload standard File 1: File 2: File 3: File 4: File 5: File 6: File 6: File 7: Overwrite existing file(s)?:	upload Transfer from another 5 Maximum File Size = 6 MB Maximum Upload Limit = 40 MI C:\fakepath\CENTRAL_LABORA	TORY.pd Browse Browse Browse Browse Browse Browse Browse Browse	Cancel	8.07 1.29 8.15 4.37	Start	
https://amc.radekal.net/up	load-manager/ind	lex.php?option=com_	records&action=logo	out#		Displaying Item	ns 1 - 4 of 4

- 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.



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9 <u>9</u> 7	Directory					
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🖽 🔄 TestFile	🛅 Terzana	68	Directory	2018/04/18 18:07		
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	ThomasBode_03_27_2018_02_34_6063900667363834129.xml	36.29 KB	XML	2018/07/13 18:15		
	A pdf-sample.pdf	7.76 KB	PDF File	2018/08/02 04:37		
	14 4 Page 1 of 1 🕨 🕅 🥸 Done.				Displaying Item	s 1 - 5 of 5

8. Now go to Create Document.

SRADEKAL MaryDee Harris, Admin Aug 2, 2018 12:05 PM PDT						1	🕻 Upload Manager 👫 He	me 🕅 Mess	ages	4
Inbox O S X Testfile (4.6 A Testfile (- A + B = 1 et		- + A	ABORATORY rest, CA				A	D A	» ^
C > C > C Plase add a page to the Document to continue.	Patient: Betty E Provider: Callie Lab Test: Lipid Lab Results	Boop Blair, MD Panel Results Value	Reference	G Status	Flag	Date				
	Triglyceride, serum fasting HDL, cholesterol,	229 mg/dL 48 mg/dL	35-150 35-65	Completed Completed	H Not applicable	05/30/2018 5/30/2018				
	seum Cholesterol, serum	213 mg/dL	0-200	Completed	н	5/30/2018				
	Cholesterol in LDL [Mass/volume] Serum or Plasma	119.0 mg/dL	65.0-130.0	Completed	Not applicable	5/30/2018				
										~

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:	Ν
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.



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LiamKnight_03_08_2 MariaHernandez_07_ Mira_holmes_01_08_	016_02 13_201 2016_0				
Oliver_Dew_04_06_2 sampleee.pdf SmithEmma_03_08_ Test_VDT_12_17_20	2018_05 2018_0 15_01_;				
Transition of Care C	DA.png				
Invalid file types:	· ×				×
<	>		< .		>
* Document Type:	Test Result	t			
* Patient:	Boop, Be	etty			٩
* Transition of Care:	No				
* Provider:	Blair, Callie	MD			
* Subject:	Height is	sue			
* Date:	07 / :	20	/ 2018 (m	m/dd/	(עעעע
* Required field					

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.



Patient	Search	
Boop	D,	٩
Select	Patient	ID
	Boop, Betty	b ₽
Car	ncel Done	

When you click Done, there will be additional fields listed under the Inbox/Document boxes.



	_		
Inbox 👌 😏 🗙		Document	1 X
/ (10 fi 🔨			~
Image(s)		Page(s)	
Dicom Test Images		sampleee.pdf	
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Carl TestFile			
CCR_Sample2.xml			
Height issue.jpg			
Important Document (1)(1).			
LiamKnight_03_08_2016_02			
MariaHernandez_07_13_201			
Mira_holmes_01_06_2016_0			
Oliver_Dew_04_06_2016_03			
SmithEmma_03_08_2016_0			
Test_VDT_12_17_2015_01_:			
Transition of Care CDA.png			
Invalid file types: 🗸 🗸			\sim
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* Document Type: Test Result	t		
* Patient: <u>B</u> oop, Bett	y		
* Transition of			
Care:			
* Test: Select test			
Comments:			
			.:
Send to Physician			
* Required field			

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.

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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.

MaryDee Harris, Jul 11, 2018 11:48	Admin AM PDT												1. Upload Manager		🐨 Messa	ges 📁
						🔒 D.C	B: 03-31-1958		<u>81</u>	8	4	Not arrived				
Consultant	Other	Nurse	Forms	Directives	Reminder	Summary	Documents									Unreviewed
ow All Past Not	15															
		Note	Туре				Subject			Sender		Provider		Status		
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:15 PM		Progre	ess				Chronic tensi	on-type		<u>С</u> В		<u>C</u> B		Closed		
1:33 AM		Progr	955				Low back pai	n		<u>u</u> s		US		Closed		
24 AM		Progre	ess							ST		ST		Closed		
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When you select a particular past note, it will be displayed and can be printed or downloaded or faxed.



Jones, Randy DOB: 03-31-1958	
Reviewed Note	
	Progress Note
	Crofton Medical
	AMC Avenue
	Ridgecrest, CA 93555
	02-01-2018
Patient Name: Randy Jones Patient ID: 16	Examining Provider: US Support, Admin
Patient Birthdate: 03-30-1956	
Patient Age: 61 years	
Chief Complaints (Annotate) Back pain	
History of Present Illness (Annot Mr. Randy Jones is a 61 ye	^{ate)} ear old male patient here today complaining of back pain. He has
chronic back pain. The pro located between the shou radiates to the left outer hi dysesthesia in the left fing Jones reports sharp pain.	oblem is constant. The patient reports numbness. The back pain is Ider blades. The problem is located on the middle back over spine. It p region and to the right outer hip region. He reports numbness or jers and the right fingers. The back pain had no obvious cause. Mr. The problem is severe. It is improved by NSAIDs.
Page Up	A V Page Down
Êrint Eax	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.

SADEKAL MaryDee Harris, Admin Jul 11, 2018 12:03 PM PDT		🐧 Upload Manager 🏼 🐴 Home	C Messages	4
	Attach Documents			
	Where is the patient data located? O Server O Local			
	Select Patient Patient Name: Jones, Randy Patient Birthdate: 03/31/1956			
Patient Documents				
Select All				
^				
	\triangleright			
	Attach Documents			

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.

CRADEKAL MaryDee Harris, Admin Jul 17, 2018 01:49 PM PDT	🖠 Upload Manager 🏹 Home 💿 Messages 🔰							
Attach	Documents							
Where is the patient data located? O Server I Local								
Select Patient Patient Name: Patient Birthdate:	Select documents Bowse. No files selected. Upload							
Patient Documents Select All								
Attac	h Documents							

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.

RADEKAL MaryDee Harris, Admin Jul 11, 2018 12:15 PM PDT				🤱 Upload Manager 🔥 He	ome 🕞 Messages	<u></u>
Rejected Documents						
Patient	Provider	Document Type	Subject	Date -	Delete	
IEST, 3	<u>с</u> в	Test Result	Test lab		x	
Patient, First	JE	Progress Note	Test Note	03-12-2018 05:54 AM	x	
Two, Test T	RWS	Test Result	ECG 12 Lead		x	

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.



Inbox 🌐 🍼 🗙	Document 🏠 🔍 🔀
/ (10 fi 🔺	~
Image(s)	Page(s)
Dicom_Test_Images	20171002233203-2196-1_3_
PDF	
Test HL7	
CCR Sample2.xml	
Height issue.jpg	
Important Document (1)(1).	
MariaHernandez 07 13 201	
Mira_holmes_01_06_2016_0	
Oliver_Dew_04_06_2016_03	
Test VDT 12 17 2015 01 :	
Transition of Care CDA.png	
Invalid file types:	× ×
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* Document Type: Test Result	
* Document Type: Test Result * Patient: TEST, 3	
* Document Type: Test Result * Patient: TEST, 3 * Transition of No	
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* Document Type: Test Result * Patient: TEST, 3 * Transition of Care: No Comments:	
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* Document Type: Test Result * Patient: TEST, 3 * Transition of No Care: No Comments:	
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* Document Type: Test Result * Patient: TEST, 3 * Transition of No Care: Comments: Addendums:	
* Document Type: Test Result * Patient: TEST, 3 * Transition of Care: Comments: Addendums:	
* Document Type: Test Result * Patient: TEST, 3 * Transition of Care: Comments: Addendums: Qelete this Document	 Send to Physician
* Document Type: Test Result * Patient: IEST, 3 * Transition of Care: Comments: Addendums: Delete this Document Page Up	: Send to Physician ▼ Page Down



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.

<i>RADEKAL</i>	System Administrator, Admin Apr 17, 2018 10:42 PM PDT				🤱 Upload Manager 🥎 Home 🗔	è Messages 🛛 🔒
Unhandled	Test Results		x			Filter Last Name
ļ	Patient -	Provider		Test	Performed	Delete
	TEST, TC13	DURRBANNA, BILLOFER		Clinical PDF Report KS228358T-1	04-18-2018	x
	TEST, TC13	DURRBANNA, BILLOFER		PRO TIME WITH INR	04-18-2018	x
! = Rejected	by Provider					Done

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.



System Administrator, Admin Apr 17, 2018 11:17 PM PDT		🤱 Upload Manager		Messages	4
Unhandled Test Result					
Information Received: View Test Result	1. Select Patient:				
Test PRO TIME WITH INR Test Code: 8947 Performed: 04-18-2018 Patient Name: TEST, TC13 Date of Birth: 05-13-1978 Provider Name: DURRBANNA, BILLOFER	Search by last name: Clear TEST, TC				
		C	ancel	Done	

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

System Administrator, Admin Apr 17, 2018 11:18 PM PDT		💄 Upload Manager 🤺 Home 📾 Messages 🖉
Unhandled Test Result		
Information Received: View Test Result 1. Select I	ent: Results: PRO TIME WITH INR	
Test: PRO TIME WITH INR Test Code: 8847	Performed: 04-18-2018	
Performed: 04-18-2018 Patient Name: TEST, TC13	Results:	
Date of Birth: 05-13-1978 Provider Name: DURRBANNA, BILLOFER	Radekal Order ID: Patient: TC13 TEST Organization: OLEST DIAGNOSTICS LENEXA Patient ID: PID13 Address: DOB: 60:51:4173 Lab. Med DireixDr, H: 000912:445 Gender: Female Lab. Med DireixDr, H: 000912:445 Rase: Jab. Med DireixDr, H: 000912:445 Rase: Jab. Med DireixDr, H: 000912:445 Rase:	
	Test Name: Clinical PDF Report KS228358T-1 Report Date: 02-14-2018 22:24:01	
	OBSERVATION RESULT UOM RANGE ABNORMA STATUS DATE/TIME OF COMMENT S LFLAG OBSERVATION	
	Clinical PDF Report F KS2283587-1	
	INR 1.2 H F Reference Ran	
	Page Up 🔺 🔻 Page Down	
	Annotation: Annotate	
	Cancel Done	
		Cancel Done

To connect this test result with the proper patient, use the Patient Search box to find the Patient and click on Search button.



System Administrator, Admin Apr 17, 2018 10:49 PM PDT				<u></u>	Upload Manager		Messages	4
Unhandled Test Result								
Information Received: View Test Result	1. Select Patient:							
Test Clinical PDF Report KS283587-1 Test Code: Clinical PDF Report 1 Performed: 04-18-2018 Patient Name: TCS1 TCC13 Date of Birth: 05-13-1978 Provider Name: DURRBANNA, BILLOFER		Search by Clear	last name: Test	٩				
					Ca	ancel	Done	

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.